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ABSTRACT

Investigation into the book buying, reading and borrowing habits is in many countries still in its infancy. Furthermore it is not yet possible to link up scientifically the socio-economic factors and market behavior. However it is justifiable to take the following principles: (1) the standard of economic development of a country determines the relative number of literates existing in the economically active adult population (18-65 years); (2) the socio-economic variables which especially influence book reading, borrowing and buying behaviour are: (a) the purchasing power of the house (a household being defined here as a (family) unit without regard for the number of individuals involved), (b) degree of urbanization, i.e. town dwellers as against the rural population, (c) standard of education (of head of family); (3) the rise in book consumption is related to the degree of development of a country but it is quite possible that the book consumption does not keep pace with the growth of the free income, that is, that part of the expendable income which is not spent on the primary necessities of life; (4) the influence on the book reading, borrowing and buying habits of mass media such as radio and television as well as that of the other forms of communication such as newspapers and periodicals, etc. has not yet been sufficiently ascertained. (Author/NH)

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REPORT

BOOK READING, BORROWING AND BUYING HABITS

by

DRS. R.E.M. VAN DEN BRINK
AMSTERDAM
THE NETHERLANDS

LI 003 475

CONGRESS COMMITTEE, P.O. BOX 14, SANTPOORT THE NETHERLANDS

BOOK READING, BORROWING AND BUYING HABITS

CONTENTS

§		Graph	Page
1	**General**		2
2	**Investigation into the position of books**		3
3	**The value of international data**		4
4	**Limitations of comparison**		5
5	**The data regarding nine countries**		5
	5.1. General		5
	5.2. Population	1	7
	5.3. Gross national product and level of private consumption	2	8
	5.4. The employed population	3/4	9
	5.5. Urbanisation	5	11
	5.6. Variation in income per household within the national community		12
	5.7. Education	6/7	12
	5.8. Recreation and reading habits	8	14
6	**Consumption of books**		17
	6.1. In numbers	9-13	17
	6.2. In terms of money	14-16	21
7	**Publishing houses**		24
	7.1. Numbers	17-19	24
	7.2. Title production per year	20	26
	7.3. Book production	21-24	27
8	**Distribution**	25	31
9	**Conclusion**		32
	Colophon		34
	Sources		35

ABBREVIATIONS USED IN GRAPHS

U.S.A.	United States of America	U.K.	The United Kingdom
B	Belgium	W.E.	The West European countries mentioned
F	France		
G	The German Federal Republic (West Germany)	T	Turkey
		I	India
N	The Netherlands	P	Pakistan

1. GENERAL

In nearly all countries the dissemination of culture in organised form is, for the most part, a direct or indirect concern of the state. In most cases 85% of the funds used for the promotion of culture (schooling, general education, publicity, information services, music, theatre, etc.) is supplied by the authorities, at a national or local level.
The printed word constitutes an obvious exception to this. In practically the whole free world publishing is in the hands of private enterprise, even though a not unimportant part, school books amongst others, is paid for out of state funds.

This forces us towards as wide a distribution of books as possible, now and in the future. At the same time the publisher, whose *raison d'être* is to bring the writer and reader into contact, must aim for profit, as every private undertaking. The sharp increase in educational work and in cultural development will put increasing demands on the growth potential of publishing. Therefore an optimum turnover is a condition for obtaining a maximum profit. Certainly it may be assumed that in the case of the publisher of books the spread of culture is promoted by his endeavour to make a profit together with his capacity for the opportune accumulation of capital by retaining earnings.

The book as conveyor of thought is written in a much more polished and enduring manner than can be attained in articles in newspapers and magazines. There is a close correlation between the book and the great changes which have occurred in the living and consumption pattern of the last few decades. The explosive growth of population, education and information is the main reason for this.

The writing of books will be the result of individual knowledge and inspiration of writers. But the proliferation and distribution of books can best be brought about by using the same impersonal and powerful marketing methods which have led since 1945 to the enormous expansion of secondary requirements of life.
In this respect it is of importance that production and distribution of books is undertaken by as large units as possible.

When speaking about the reading, borrowing and buying habits of the whole world, it is necessary to simplify the complex character of these habits and to restrict oneself to giving some main points concerning their size, background and development. In addition it is desirable to relate any data which have been found directly to the work of the publisher.
The intuition and inventiveness of the publisher will remain an indispensable factor in the originating and distribution of books, fulfilling a need which has great inherent purchasing power. Nevertheless, as continually expanding markets develop an increasing need will be felt for figures which disclose the underlying pattern of this market, both concerning the quantitative factors (reading habits, number of readers) and the qualitative factors (reading motivation).

The study of the market for books should from the outset be directed towards the main objectives of a micro-economic and macro-economic nature. Both determine the growth potential of the individual publisher.

The figures, trends and tendencies which should be investigated do not, therefore, set out to give a purely scientific report. They proceed from the practical consideration that the availability of information on the book market, national or international, can offer nothing more (or less) than **the reduction of uncertainties for the publishers when making decisions in book production**. In this context it is not relevant whether the decision is being taken by a group of publishers (e.g. concerning collective propaganda) or by an individual publisher.
This point is of particular importance because, in the case of growing concerns, the individual initiative of the staff members in taking decisions tends to decrease as the contribution on the part of the organisation increases.
It is therefore indispensable that outside information be made available in order to improve the possibility of making correct decisions. This is becoming of still greater importance because the planning of a series of publications is demanding increasingly more time with increasingly higher investments.
This last point must again be seen in the light of the fact that the average publisher is still working with a limited capital and often without the possibility of arriving at a substantial and quick growth of that capital via the stock exchange. One wrong investment or interrelated sequence of investments can set back the development of a publisher for many years.

Apart from the usefulness of information from the micro-economic side, there is also the macro-economic benefit. This arises from the consideration that the pattern of consumer needs is always in a state of flux and is subject to external influences. This goes for the highly developed industrialised countries as well as for countries still in the process of developing.
There is the possibility that as incomes increase, that part of the income which does not have to be spent on the necessities of life rises particularly rapidly and forms a background for a more than proportional growth of demand for books. There is thus in the developing countries even a chance of extraordinarily rapid growth – not only because here there happens to be a large increase in population, but also because of an obvious increase in literacy.

The book market has scarcely ever been the subject of close scrutiny and investigation regarding the subject now in question. This applies not only to the consumption on an annual basis but also to that over shorter periods (monthly, quarterly, etc.) which yields a picture of the seasonal pattern.
Neither have the structure and the quantitative analysis of production and distribution yet been fully examined. One also finds that concerning reading behaviour and its motives one is still often groping in the dark.
Consequently one is led to ask oneself whether indeed the book reading, borrowing and buying habits can really be a subject for the international publishers congress in 1968.
In spite of any reservations the answer is in the positive.
The developments taking place in the book market are so very great that to put off discussing them until 1971 would be imprudent, not to say rash.

2. INVESTIGATION INTO THE POSITION OF BOOKS

The consideration that it is desirable to promote market and motivation research also in the field of books has led since 1960 to the founding of research institutes in The Netherlands, West

84

Germany and France. Since 1964 these institutions have been working together in international liaison, and also with the secretariats of publishers' organisations in various other countries. The figures which will follow have been compiled under the auspices of this group and amongst others from the publishers' organisations in the countries concerned or other sources. They have been compiled by the office of the Dutch research organisation "Stichting speurwerk betreffende het boek" in Amsterdam.*

As mentioned earlier, investigation into the book buying, reading and borrowing habits is in many countries still in its infancy. Furthermore it is not yet possible to link up scientifically the socio-economic factors and market behaviour. However it is justifiable to take the following principles as our starting point:

1. The standard of economic development of a country determines the relative number of literates existing in the economically active adult population (18-65 years).
2. The socio-economic variables which especially influence book reading, borrowing and buying behaviour are as follows:
   (a) The purchasing power of the household (a household being defined here as a (family) unit without regard for the number of individuals involved)
   (b) Degree of urbanisation, i.e. town dwellers as against the rural population
   (c) Standard of education (of head of family).
3. The rise in book consumption is related to the degree of development of a country but it is quite possible that the book consumption does not keep pace with the growth of the free income, that is, that part of the expendable income which is not spent on the primary necessities of life.
4. The influence on the book reading, borrowing and buying habits of mass media such as radio and television as well as that of the other forms of communication such as newspapers and periodicals, etc. has not yet been sufficiently ascertained.

3. THE VALUE OF INTERNATIONAL DATA

As already said definite restrictions have been maintained when using the numerical data. Those that are given here have been consciously limited to a few main points regarding the standard of development per country, their means of existence, urbanisation, education, etc., as well as those regarding the buying and borrowing habits, production and distribution of books. They concern some groups of countries which on the basis of the present degree of economic and cultural development may be considered to be more or less an extension of each other. The figures may suggest a surging forward which on the other hand does not necessarily indicate an automatic forecast for further growth. However they can be taken to be the background to a conceivable (minimum) trend. And for promoting the reading and buying of books it is advantageous that the countries at every stage of development learn from the (missed) opportunities in countries with a higher degree of development.

One should bear in mind that with the increase of freely expendable income and the increase of leisure time, the consumer remains free to satisfy his higher needs in other fields than that of

* See p.35

books. Precisely because books (other than educational books) are often still considered "luxury" items, it is clear that the choice of the consumer is also determined by the forcefulness of the offer, the effectiveness of the marketing alongside the efficiency of the distribution.
It may be assumed that for the industrial countries of the world the next few years will be to a large extent decisive for the growth curve of the sale of books. Many of the secondary and tertiary needs of life are satisfied by a very limited number of (or groups of) enterprises which by their size and profit-making capacity and consequent continued growth are in a position to noticeably influence consumer behaviour. Not only because they exploit all the arts of marketing but also because they have the channels of distribution at their disposal or are in a position to strongly influence or even monopolize them.
One is therefore justified in asking what publishers are doing about this regarding books both nationally and internationally.

4. LIMITATIONS OF COMPARISON

For a good understanding of the figures which will now follow I would like to make the following point. Undoubtedly criticism may be levelled at a comparison of figures for different countries with strongly differing economic structures and price levels.
Because the price of foreign exchange is determined by the total import and export of goods and services even with a completely free rate of exchange, it does not follow that the general price level has to be identical to that of specific goods and services, such as books, education, etc. These differences may prove to be considerable on deeper analysis, especially as in both cases the labour costs are relatively high. This means therefore that bringing national figures under one, common international denominator on the basis of exchange rates, may be unsatisfactory where it concerns countries with different standards of development. With statistical analysis as it is today, however, it is impossible to make proper allowances in this respect. When considering the graphs, therefore, one must take into account that the differences appearing in amounts of money are greater than if they were converted into "goods in kind".

5. THE DATA REGARDING NINE COUNTRIES

The figures have been gathered together as far as possible into visual graphs. They concern only a limited number of countries. It proved impossible to include more than nine countries in the four groups (which are divided according to degree of economic development) because the figures were either not available, or, in spite of repeated requests, did not arrive in time. The comments have been kept as brief as possible. It has been taken for granted that the reader will take the trouble to study the graphs and figures. Conclusions which follow directly from the given data have been left out in view of the available space.

5. 1. General

The phenomena mentioned below give us an idea of the socio-economic structures of nine

countries and also the book reading, borrowing and buying habits, in so far as figures are available. In the main the countries under consideration may be separated into four groups:

	Inhabitants (1965) (x 1 million)
1. United States of America	195
2. Five West European countries: Belgium, France, the German Federal Republic (West Germany), The Netherlands and the United Kingdom	183
3. Turkey	31
4. India and Pakistan	575

These comprise a total population of approx. 980 million inhabitants or about 30% of the world population. They represent about half the population of those countries where book publishing is not exclusively in government hands.
These four (groups of) countries show a measure of similarity of make-up regarding their socio-economic structure which does not mean to say that there are no differences between, for example, the five West European countries.
For the goal we set ourselves in this part, we shall on the one hand consider these five countries separately, and on the other take into account the averages for the group.
It is known that the Gross National Product of the countries and groups of countries decreases in the order mentioned above.
A few other important phenomena run parallel with this. In the highly developed U.S. the essential part of the economy lies in the tertiary sector (commerce, transport, services), in Western Europe in the secondary sector (industries) and in the less developed countries, Turkey, India and Pakistan, in the primary sector (agriculture).
The connection between the means of existence and the subject in question will be indicated in considering graph 3.

In this report the statistics which concern the book market are given mainly on the basis of

1. the number of households as buying units
2. the reading population (literates) between 10 and 65 years as potential readers and/or buyers in the book market

The advantage of this is that we hereby eliminate the factor of the greatly diverging size of family in countries at completely different stages of development. By limiting the population figures to the group between 10 and 65 years we also prevent figures relating to a totally different population pyramid from distorting the picture. For within the part of the pyramid used, the differences are not so great and the influence of the population between 0 and 9 years and those older than 65 years on the present investigation is relatively slight.
Furthermore we have taken as our starting point wherever possible that part of the population which can read. Given the fact that the population in the U.S.A. and Western Europe in the age group 10-65 as a whole is literate and in Turkey as well as in India and Pakistan to a much lesser degree, it is clear that when comparing consumption figures we must as much as possible consider the **reading** population. For **general** socio-economic statistics the description and analysis of the material is only related to the size of the population provided this does not

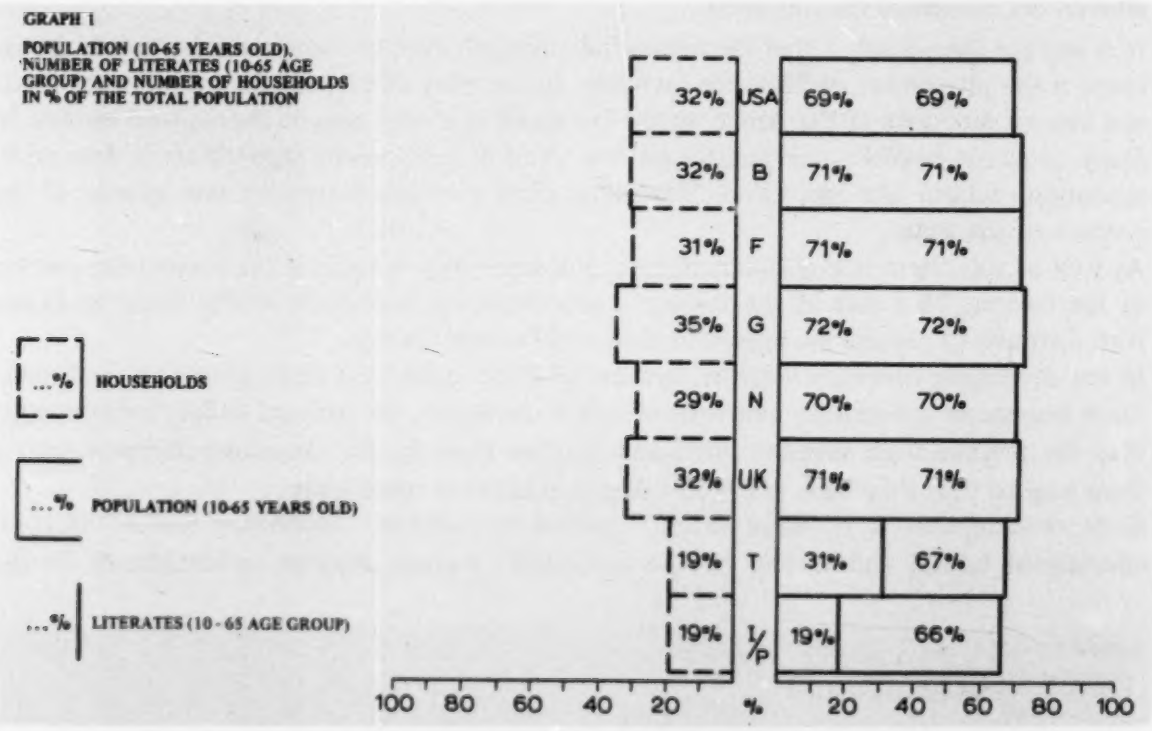
distort the picture. We have therefore tried to express the collected data in the most meaningful units.

5.2. Population

The figures given in graph 1 on the relative position of the number of households as buying units and the number of literates within the 10-65 years age-group show the sometimes great disparities that exist between the various countries.

GRAPH 1

POPULATION (10-65 YEARS OLD), NUMBER OF LITERATES (10-65 AGE GROUP) AND NUMBER OF HOUSEHOLDS IN % OF THE TOTAL POPULATION



From this graph it will be noticed that of the five West European countries and the U.S.A., The Netherlands has relatively the smallest number of households. This points to a high birth rate as well as a very low death rate. A result of this latter fact is that in this country the category of those older than 65 years is relatively large, and that consequently the 10-65 years age-group (70%) is somewhat smaller than in the remaining West European countries.

The figures concerning literates in the 10-65 years age-group show the necessity of basing the comparative book consumption figures on the readers among them.

Moreover, it is clear that the low percentage of literates in the three developing countries will lead to a substantial increase in the number of readers in the near future.

The size of the average family in these countries is large, and because of this, the number of households is relatively small. The increase in the number of readers could therefore be large, since a very great number of the children are now receiving schooling. The conclusion is that in the developed countries the number of readers only increases with the nett growth of the population, which for most countries is approximately 1% per annum, excluding the consequences of immigration (U.S.A.).

The number of readers in the developing countries can increase by 3 or more % per annum.

5.3. Gross national product and level of private consumption

Our second graph gives a general picture of the level of expendable income at which the groups of countries are at present to be found. It is important here to take the annual Gross National Product (G.N.P.) as the starting point. This is the sum total of all finished products (goods and services) plus gross investments. When the amount so calculated is reduced by government expenditure and savings in the private sector there remains that part of the national income which is available to private households (expendable income). In order to make a worthwhile comparison possible the total amount per country has been converted into an amount per household (buying unit).

It is evident from graph 2 that the higher the country's average income per household is, the lower is the proportion available for spending. In the more developed countries the magnitude and various functions of the public service lay claim to a large part of the national income. In many countries between one quarter and one third of government expenditure is devoted to education, culture and recreation. Education alone sometimes requires one quarter of the revenue of the state.

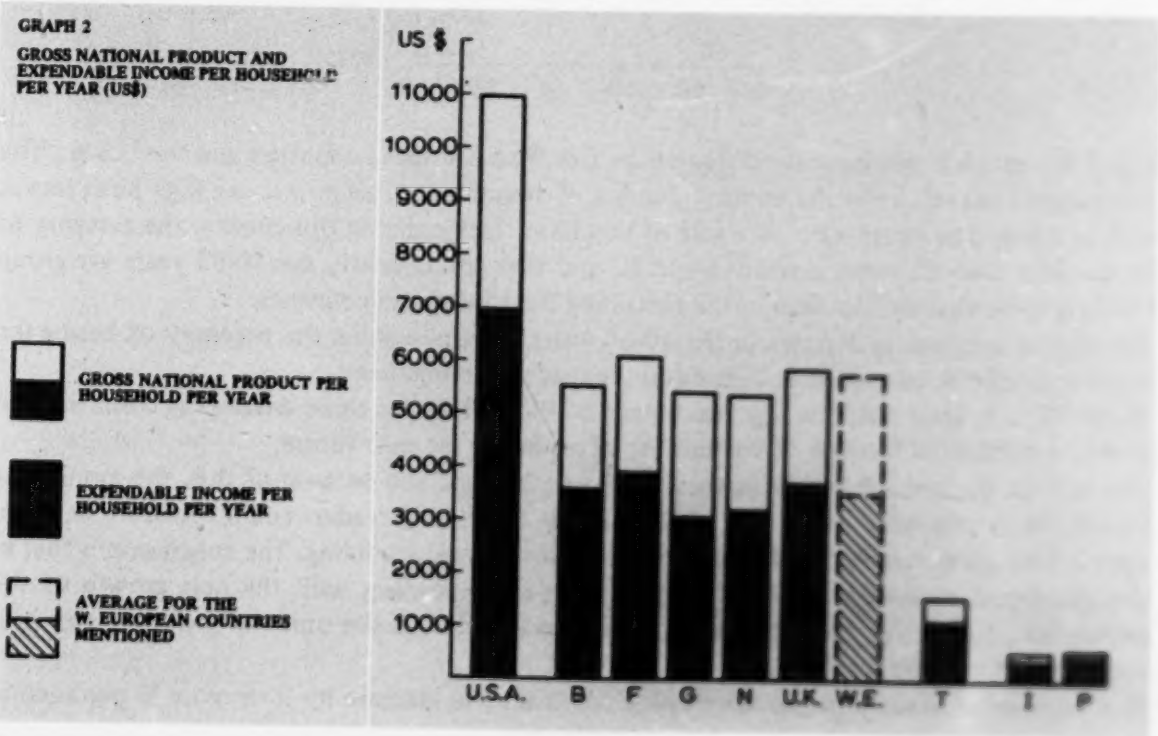
As well as this there is a readiness to save, and what then remains is the expendable portion of the income. This part of the income is proportionally the lowest in The Netherlands and West Germany (57%) and the highest in India and Pakistan (80%).

In the developing countries however, because of direct or indirect development aid, and sometimes because of inflationary financing of state expenditure, the national budget is much larger than the revenue from taxation and loans. Because these factors sometimes fluctuate greatly from year to year they have not been taken into account statistically.

Book consumption is to some extent financed by national expenditure (public libraries, educational books) and further by the expendable income available to households. In the

GRAPH 2

GROSS NATIONAL PRODUCT AND EXPENDABLE INCOME PER HOUSEHOLD PER YEAR (US$)

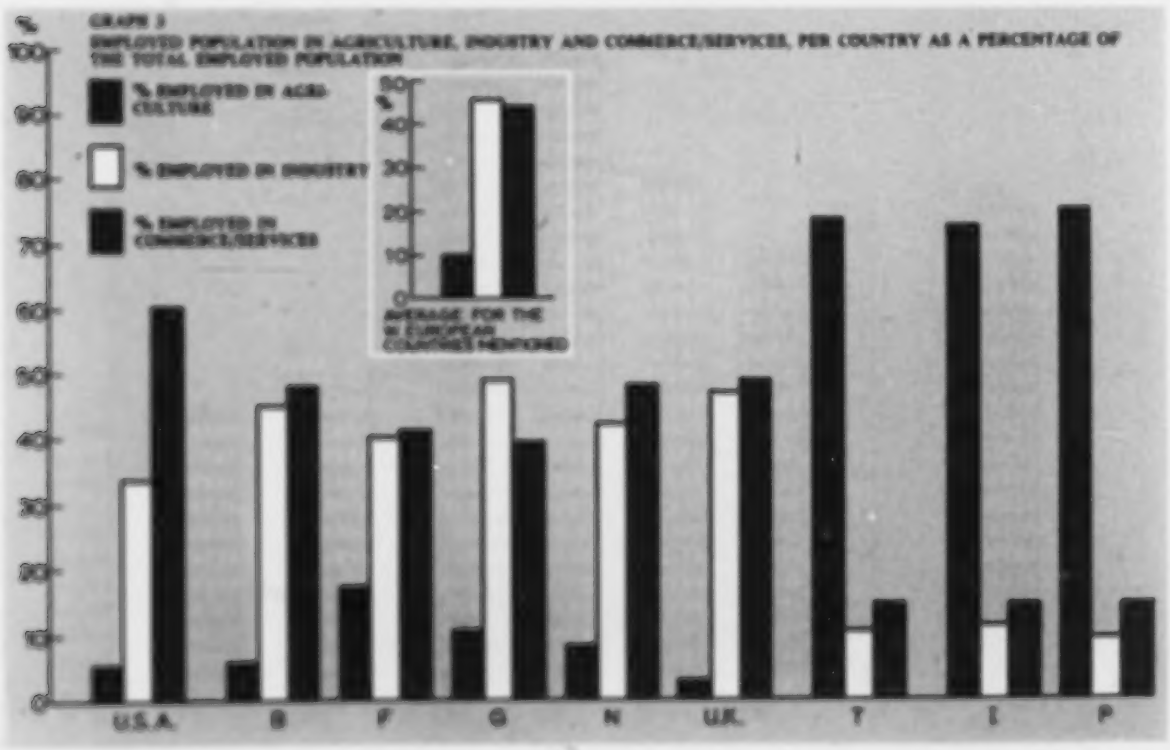


developing countries the purchasing accent lies upon educational books, while in the economically more advanced ones this accent is focussed upon other, not strictly educational, types of book.
In some West European countries these latter categories amount to approximately 80% of the total book purchases. The role of libraries differs greatly from country to country and is the greatest in developing countries.
Graph 13 will show that the average book consumption in the various countries does not uniformly increase per country in proportion to a higher G.N.P. or expendable income per household. Where there is a high level of prosperity, public interest in books may well be ousted by products which gratify stronger needs or are "pushed" more forcibly.

We shall now deal with the socio-economic factors which, in addition to the size of the G.N.P., also strongly influence the level of the sale and borrowing of books. These are: employment structure (5.4.), urbanisation (5.5.), buying power of the household (5.6.), schooling (5.7.) and recreation (5.8.). These factors are strongly inter-related.

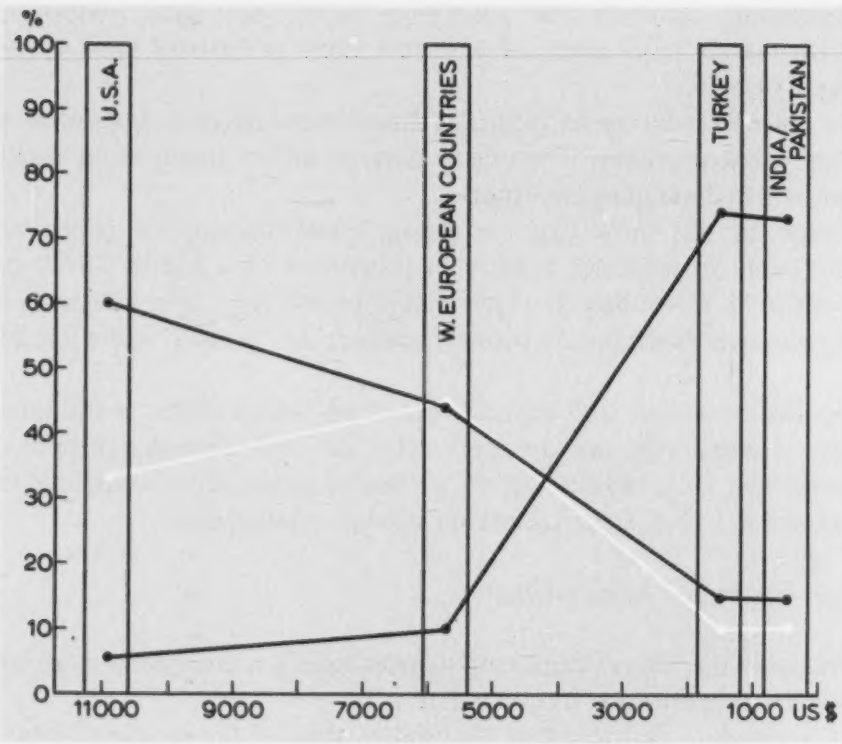
5.4. The employed population

As a rule the diversities of employment signify a divergency in attitude, consumption pattern, amount of leisure and its utilization.
It is therefore desirable that the relative share of the various divisions of labour in the working population be shown.
From graph 3, showing the principal divisions of labour, it is evident that the size of the national revenue is directly proportional to the relative increase of the share of commerce over that of agriculture. It may also be seen that the share of industry first increases with a rise in the



GRAPH 4

NUMBER OF EMPLOYEES IN AGRICULTURE, INDUSTRY AND COMMERCE/SERVICES PER COUNTRY AS A PERCENTAGE OF THE TOTAL EMPLOYED POPULATION (VERTICAL SCALE) IN RELATION TO: THE GROSS NATIONAL PRODUCT IN US$ PER HOUSEHOLD PER YEAR IN THE SAME COUNTRIES (HORIZONTAL SCALE)

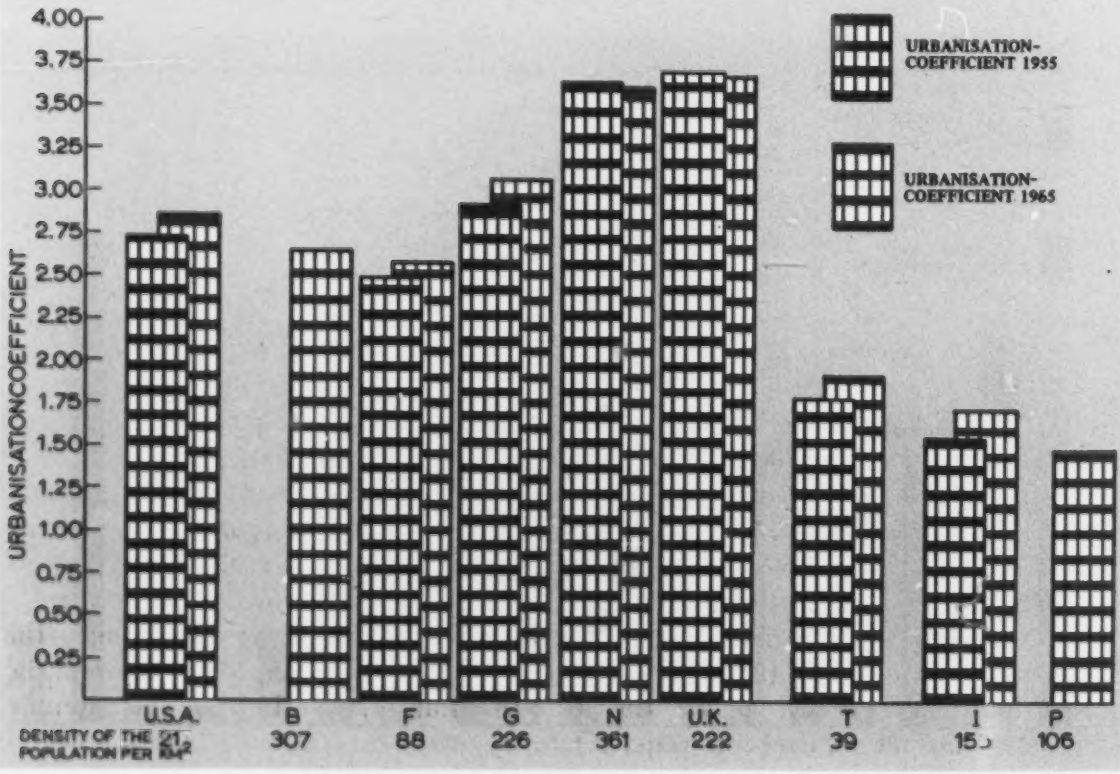


AGRICULTURE

INDUSTRY

COMMERCE/SERVICES

GRAPH 5 URBANISATIONCOEFFICIENT PER COUNTRY IN 1955 AND 1965



degree of development, but after further growth, claims a proportionally lesser part of the working population. The developments in the electronics field at present taking place on the gigantic U.S.A. market will indicate how this comes about. Moreover, it is well known that the services sector in highly developed countries increases more than proportionally to the national revenue or Gross National Product.

These data may also be combined and graphically superimposed on the Gross National Product calculated per household in the (groups of) countries. This is shown in graph 4.

It is not possible, on an international basis, to relate the book consumption in the countries concerned with the distribution of the working population over the three main divisions of labour. For, within each division,e.g. industry and agriculture, the degree of mechanisation is decisive with regard to income, working hours and therefore leisure hours, consumption pattern etc. of those employed within these divisions. On the other hand, such a relation may well in general be found on a national basis where the economic background is the same for all households. Thus one may predict the influence of the transition of a country from agricultural to industrial etc. in regard to book consumption.

It can generally be stated that the highest book consumption per country is found in the sector engaged in commerce, after which follows industry and finally agriculture. Let it be repeated here that the creation of more opportunity for spending more time and money does not necessarily mean that this will automatically take place. A suitably dynamic approach is required for the opportunities to be taken up. Nevertheless, the conclusion must be that the growth of book consumption is indeed promoted by the transition of a predominantly agricultural country to one of industry and commerce.

5.5. Urbanisation

From surveys in connection with the purchase and reading of books made in The Netherlands since 1962 it can be concluded that, although practically all Dutchmen of 6 years and older can read, not inconsiderable disparities have been established, for instance in regard to the book reading behaviour, between city and country dwellers.

Residents of cities generally read and buy 20% more books than their rural counterparts. Surveys in other countries point in the same direction. This phenomenon is naturally also connected with the predominantly agricultural character of rural areas and is related to the average low level of schooling and income. And yet this is not the entire explanation. Relatively more is read in large cities than in smaller ones.

It is interesting in this connection to observe to what extent the degree of urbanisation in the countries concerned has risen in the period 1955 - 1965 (1955 figures for Belgium and Pakistan are not available).

Graph 5 therefore shows both the urbanisation coefficient and the density of population. In international practice a standard value of 5 is ascribed to the first mentioned coefficient if the total population lives in cities with a population of more than 100,000. The observed international increase of urbanisation can thus lead to a not insignificant growth in book consumption. In this connection it is naturally of importance that the augmentation of the city populations should not be due to an irrational migration to these cities to find either work of a very low level or no work at all.

As well as urbanisation, the density of population can be of importance with regard to the

12

purchase of books, due to a better distribution system. Dense habitation promotes the possibility of building up a tight network of sales centres. The great diversity of book titles demands display via the shop counter, especially in regard to the cheaper book. (See further graph 25.)
One should really complete the general population density figure with the relative density of the residential areas. It is stated, for instance, that in the U.S.A. 95% of the population lives on 5% of the land area.

5.6. Variation in income per household within the national community

Variations in household incomes naturally also influence book consumption. There is insufficient data available in respect of some of the countries studied to draw up a comparative graph and, in any case, the divergencies of the cost of living in the various countries would hamper the comparison. Some research has however been done on a national basis.

In 1963 it was found that in The Netherlands those who never buy books were practically absent (7%) from the households with an income in excess of $4,500 per annum. This percentage rose to 37% at an income level of $1,000, while the highest percentage, 53% of "never buyers", is found among those with an income of less than $600.
In this country surveys have been made of the relation between income and book borrowing, showing that as behaviour patterns, book borrowing and buying are closely linked. The correlation is indicated by the following figures for the borrowing and buying habits of three categories of readers.

Borrowing frequency	once per week or more	two to three times per month or less	never
Average (median) buying frequency	once per three months	once per six months	once per seven months

The surveys have further shown that in The Netherlands the appreciation of book reading as a personal activity is positively correlated with prosperity, level of education and receptiveness to the adoption of new habits.

An increase in the average income per household will lead to a rise of book consumption in any particular country. Whether this is more or less than proportional to the higher income is the big point in question.

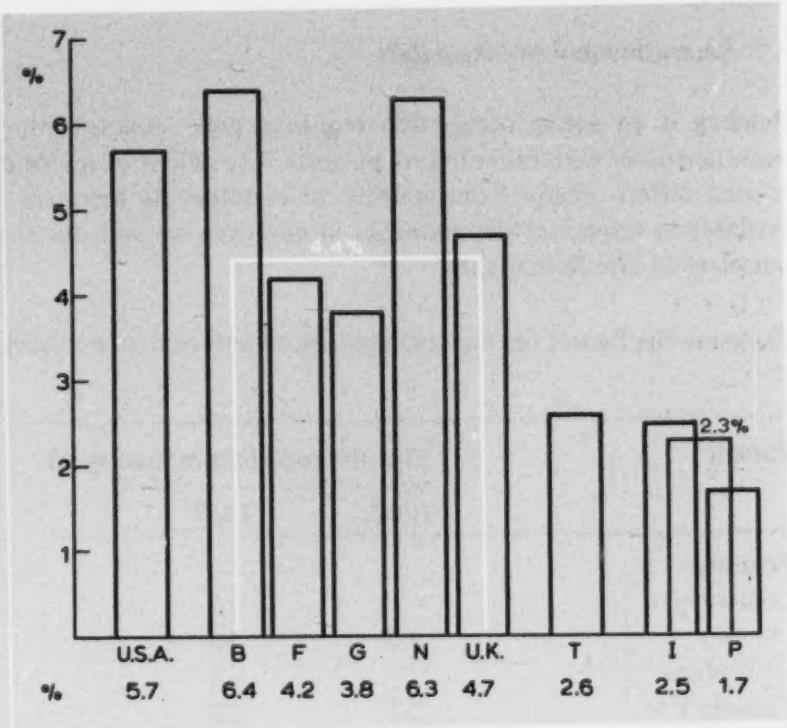
5.7. Education

There is a direct connection between the extent of education and the readiness to read books. This reading takes place by means of borrowing or buying, whereby proportional to a higher standard of education, the incidence of borrowing generally decreases and that of buying

increases. An extra impulse is given to purchasing by the fact that there is usually a definite relation between education, social position and the level of the expendable income.
In a number of W. European countries surveys have shown that persons with secondary and higher education spend 50% more of their leisure hours reading books than do those with only a primary education. Book purchases are more than 100% higher.
The expenditure which is devoted – principally by the government – to education, affords some conception of the effort made within the national domestic economy to promote education in both breadth and depth. A relation can thus be laid between government expenditure for education and the Gross National Product (graph 6).

GRAPH 6

ANNUAL GOVERNMENT EXPENDITURE FOR EDUCATION AS % OF THE GROSS NATIONAL PRODUCT



%OF THE GROSS NATIONAL PRODUCT

AVERAGE FOR THE W. EUROPEAN COUNTRIES MENTIONED

AVERAGE FOR INDIA AND PAKISTAN

The by no means low percentage shown for the developing countries ostensibly clashes with the fact shown in graph 1 that there are still so many illiterates in these countries. On the one hand educational expenses are also financed from development aid, and on the other it will only be after a number of years that the results of this education will become apparent when the present school children under the age of 10 have joined the 10 - 65 years age-group shown in graph 1.
It is also useful to consider the maximum amounts expended per student within the consecutive types of education. These can be seen in graph 7 (page 15).

We repeat here that the sums quoted for the developing countries do not give an accurate picture of the difference in actual facilities at the disposal of the student. As the greatest portion of these educational expenses can be traced back to those of labour, it can be assumed that the actual facilities are sometimes at least three times the statistical amounts converted at the (general) rate of exchange of the currencies. On the same grounds it can be

assumed that the expenditure in the U.S.A. is rather actually lower than higher than those in the West European countries. The great difference between the U.S.A. and these countries is that a larger percentage of the population is being educated in the U.S.A. in comparison to West Europe. These are respectively 28% and 18% of the total population. The relative effort measured by the national expenditure for education in relation to the total population is thus the largest in the U.S.A.
The conclusion must be that the potential expansion of the book market in the U.S.A. is large. But it is also a country where the methods of influencing the market for other products in connection with recreation are the most highly developed.

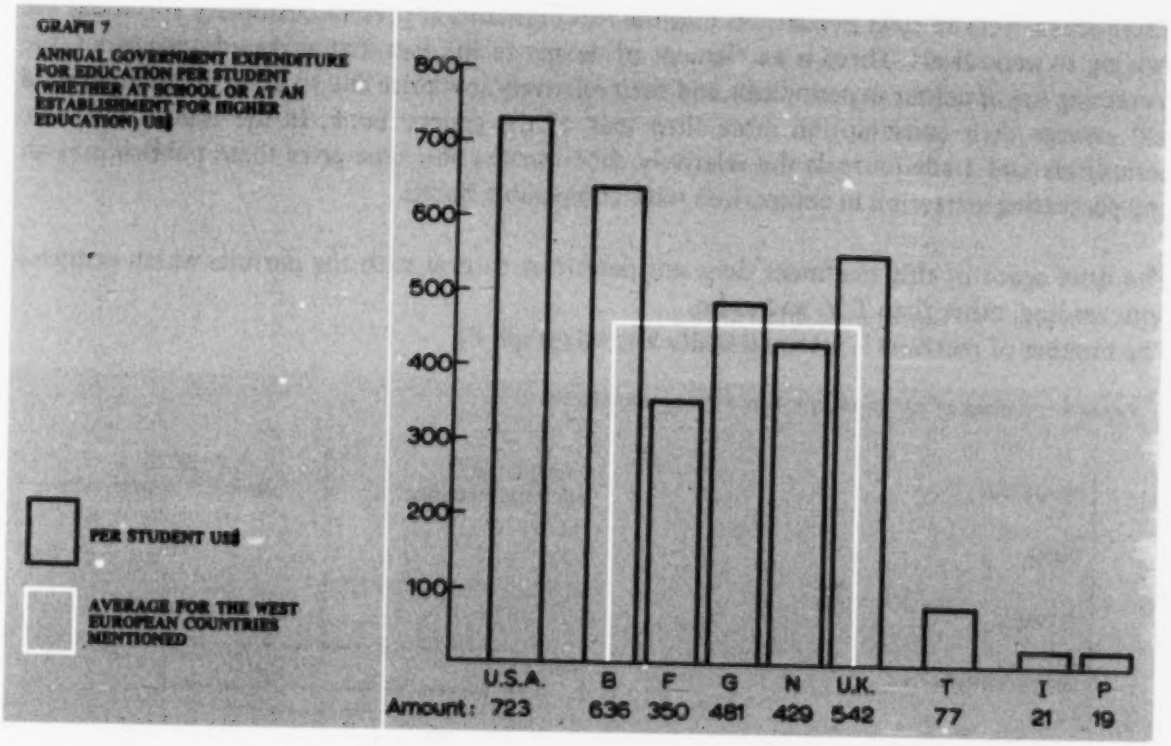
5.8. Recreation and reading habits

Reading is an active occupation requiring great concentration which cannot be carried on simultaneously with other leisure pursuits. The extent of this leisure and the manner in which it is used differs greatly from country to country. As there are in this regard insufficient data available in respect of the countries in question, we will, for the sake of convenience, confine ourselves to The Netherlands.

These are the figures for the (average) use of leisure time per week by adults in 1962 and 1967

Pursuit	% of the total leisure time spent	
	1962	1967
Reading		
Newspaper		10
Book	17	10
Periodical		3
Viewing T.V.	22	23
Other	61	54
	100	100
Total time spent per week	28.8 hours	39 hours

Leisure time thus increased by 35% in the course of the intervening six years. The absolute time spent on reading almost doubled in the same period.
It is unfortunate that the figures do not permit direct comparison of the time spent on book reading, although it is encouraging to note that the share of reading in general has increased while that spent on viewing T.V. has remained almost the same.
A survey held in The Netherlands in 1955-56 analysed the relationship between employment, social position and the reading of books, periodicals and newspapers. The following indexes with respect to the hours spent on reading can be given for the male population (the time in hours spent by those classed as "employed middle class" has been given the index 100).


GRAPH 7
ANNUAL GOVERNMENT EXPENDITURE FOR EDUCATION PER STUDENT (WHETHER AT SCHOOL OR AT AN ESTABLISHMENT FOR HIGHER EDUCATION) US$
PER STUDENT US$
AVERAGE FOR THE WEST EUROPEAN COUNTRIES MENTIONED
800
700
600
500
400
300
200
100
U.S.A. B F G N U.K. T I P
Amount: 723 636 350 481 429 542 77 21 19

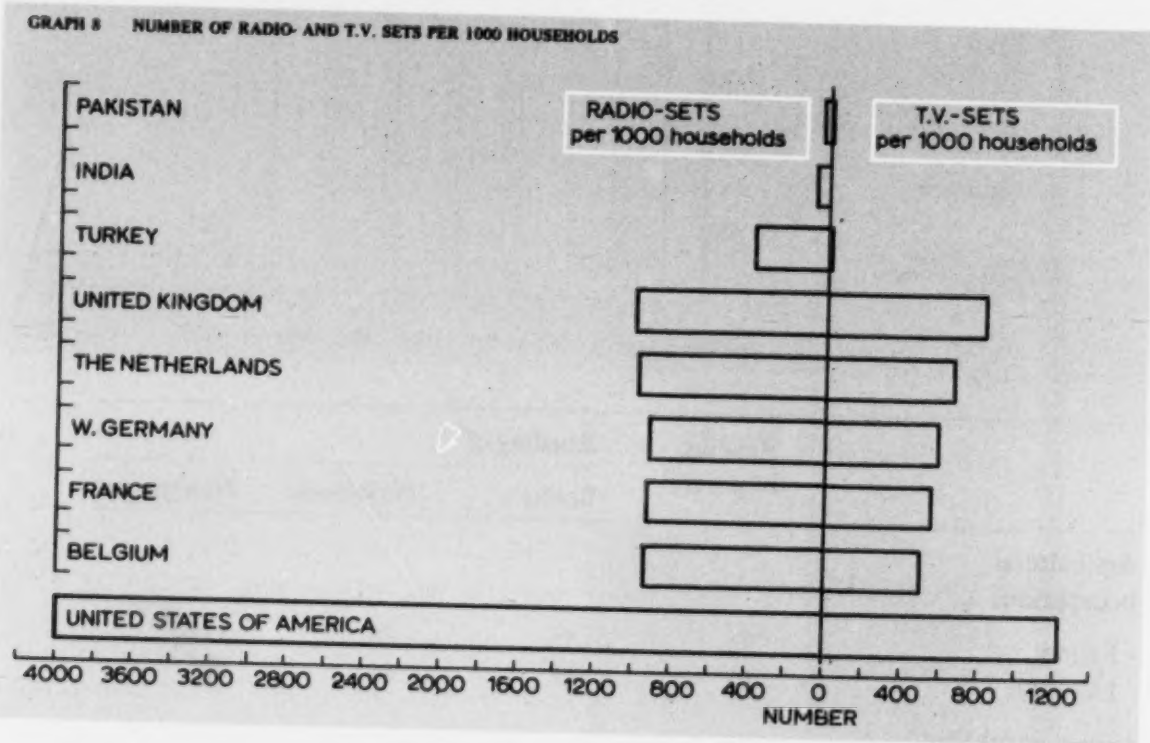
	Reading in general	Reading of		
		Books	Periodicals	Newspapers
Agricultural occupations				
Farmer	82	55	86	111
Labourer	82	45	86	121
(Semi-, un)skilled workers (not in agriculture)	91	90	71	96
Middle classes				
self-employed	91	74	114	104
employed	100	100	100	100
Executives	91	84	100	93

It is clear from this table that the rapidly growing group of employed middle class men spends more time on reading than do the other groups quoted.
A noteworthy feature is that the small executive class spends less time on newspapers than does any other group. It is also seen that executives (who form the strongest group economically) do not achieve the highest score for books or periodicals either.
It is a great pity that the survey has never been repeated in more recent years.

There are (as yet) no clear indications that the reading habits at present customary for books are moving to periodicals. There is an element of danger in the fact that as regards magazines, the increasing use of colour in periodicals and their relatively low price due to advertisement revenue will enlarge their consumption more than that of the general book. In the case of scientific periodicals and trade journals the relatively short production time gives these publications an ever-increasing attraction in comparison with comparable books.

The brief space of this treatment does not permit us to deal with the pursuits which compete with reading, other than T.V. and radio.
The number of receivers is internationally known (graph 8).

GRAPH 8 NUMBER OF RADIO- AND T.V. SETS PER 1000 HOUSEHOLDS



The great variation between the number of sets in the U.S.A. and West Europe can be clearly traced back to the fact that in the U.S.A. there is more than one set per home. This need scarcely be of influence on the amount of time spent in viewing or listening.
The effect of T.V. and radio on recreational pursuits has not been internationally determined.

Proceeding with the above data for one country, i.e. The Netherlands, the following conclusions may be drawn. There is a negative connection between the amount of time spent on reading books and on watching T.V. The correlation coefficient in 1962 was -0.14. (In the case of complete negative correlation the coefficient is –1; it is +1 when the positive correlation is complete). No insight has been gained into the background of this phenomenon. It can, however, be suggested that for the elderly and the less well-educated, T.V. in particular served as a substitute for non-active occupations during the period in which T.V. had not yet made its influence felt in the family circle.

Here again arises the desirability of obtaining a comparative survey regarding the influence of

T.V. on reading habits in respect of countries with a not-too-great diversity in degree of economic development. In the U.S.A., T.V. is without doubt one of the primary necessities of life, in the West European countries one of the secondary, and in the developing countries a tertiary necessity. The influence of T.V. on reading habits in these countries will therefore differ greatly. The knowledge of the correlation between increasing prosperity and T.V., with the latter's negative influence on book consumption, permits the prediction of the results to be expected for countries at varying stages of development.

There is international unanimity regarding the proposition that radio does not disturb reading habits, and that by extending the degree of interest for current affairs it even promotes reading.

6. CONSUMPTION OF BOOKS

6.1. In numbers

If in considering the reading of books one wishes to differentiate between those borrowed and bought, it is inevitable that the comparison be made in numbers. This comes about because, as a result of the large state subsidy in all countries, the cash turnover with regard to borrowed books cannot be compared with that resulting from the purchase of books. The disadvantage of comparing numbers is that, by so doing, the great variations in the size and presentation of books are altogether set aside. An indication may however be gleaned from the average price of the produced book based on the most recent data (see graph 16).
This difference in price and presentation (relative price) is not a serious obstacle to the comparison of national figures concerning borrowing and buying, but does certainly hamper comparison on an international basis. It is obvious that the average presentation, size, etc. of books can vary greatly from country to country.

In graphs 9 - 13 the vast national disparities in borrowing and buying habits have been analysed and expressed in numbers of books as follows:

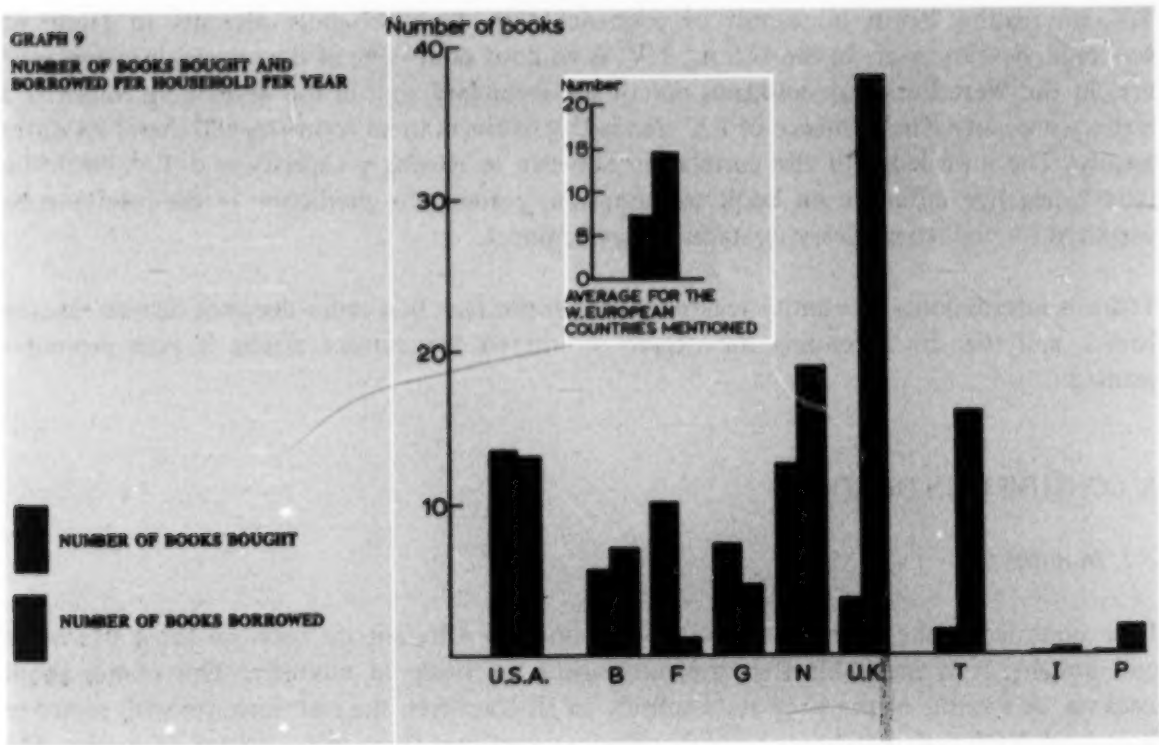
1. number of books borrowed as against those bought, per household and per country (graph 9);
2. ditto, per literate and per country (graph 10);
3. ditto, balance borrowed/bought per literate and per country (graph 11);
4. total borrowed + bought, per household and per literate - per country (graph 12);
5. ditto, compared with Gross National Product and expendable income of households, - per group of countries (graph 13).

As the data under consideration form the quantitative nucleus of this account the figures are based on both the numbers per household as well as per literate.
We are inclined to doubt the representativeness of the figure in regard to borrowing habits in England. As we have no other figures in this respect at our disposal, we have perforce used these in graphs 9 - 13.

Although the data on buying and borrowing are given here in households (graph 9), it is still

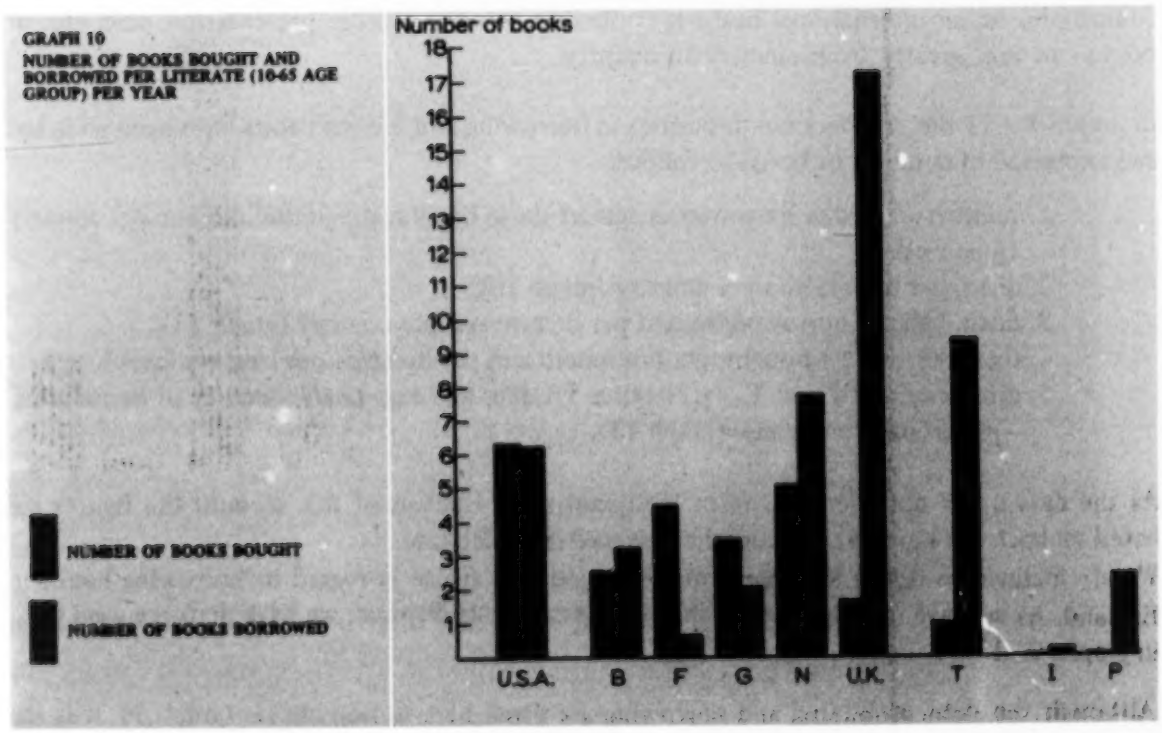
GRAPH 9

NUMBER OF BOOKS BOUGHT AND BORROWED PER HOUSEHOLD PER YEAR



GRAPH 10

NUMBER OF BOOKS BOUGHT AND BORROWED PER LITERATE (10-65 AGE GROUP) PER YEAR



easy to see that the amount of borrowing in the developing countries exceeds that of buying by a factor of 9–40. This factor is entirely different in the developed countries. In the U.S.A. borrowing is practically equal to buying. In the five West European countries the number of books bought is, on average, nearly 50% of those borrowed. There are however significant differences within Europe, pronounced positive and negative deviations being found in the U.K. and France. The borrowing of books can strengthen the growth of book reading, provided that there are ample books readily available for purchase. Although opinion varies in this respect, we feel that publishers should co-operate in helping to promote borrowing in countries (e.g. France) where this lags behind buying. It would seem that in the U.K. quite the reverse is the case, and that borrowing is so strong with respect to buying that the economic growth of publishing could quite possibly be hindered.

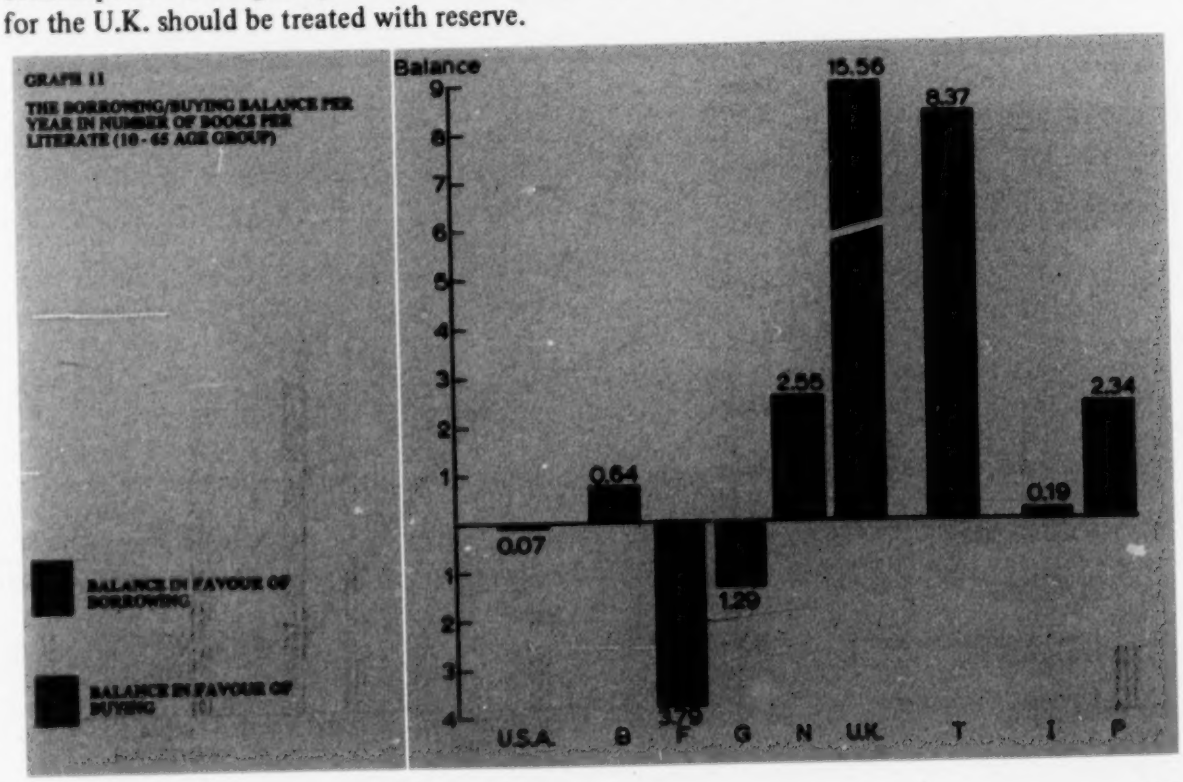
As has already been said it is desirable that, for the developing countries, borrowing and buying habits should be expressed in figures per literate. This is the basis used for graph 10.

The relationships existing between the figures for the various countries in graph 10 are different from those in graph 9 because of the great international variation in the number of households and literates (see also graph 1).

In order to prevent that the differences in borrowing and buying become insufficiently clear because of too many diagrams containing peaks of very different height, graph 11 shows the borrowing/buying balance obtained from graph 10. The number of books bought is taken as the zero line.

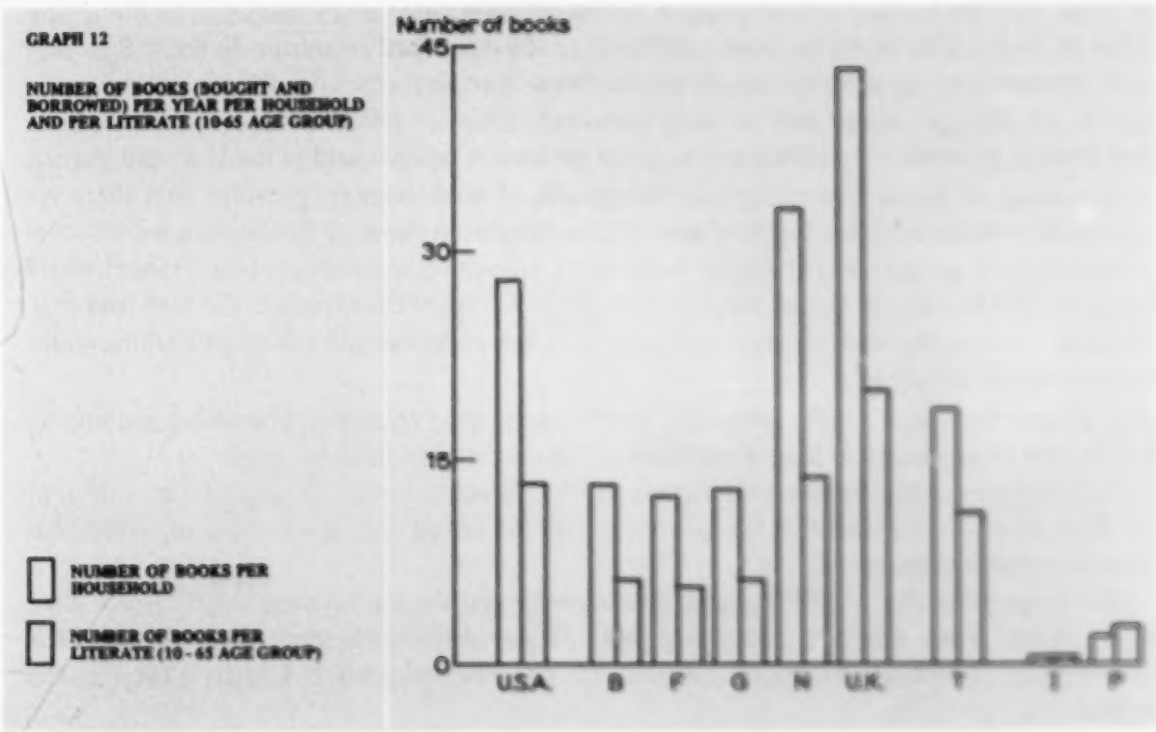
From surveys in the countries concerned it will be possible to decide what publishers must do collectively in order to eliminate the unfavourable variations.

Graph 12, illustrating the number of books bought and borrowed, shows that the total book consumption varies greatly in the West European countries. As has been pointed out, figures for the U.K. should be treated with reserve.



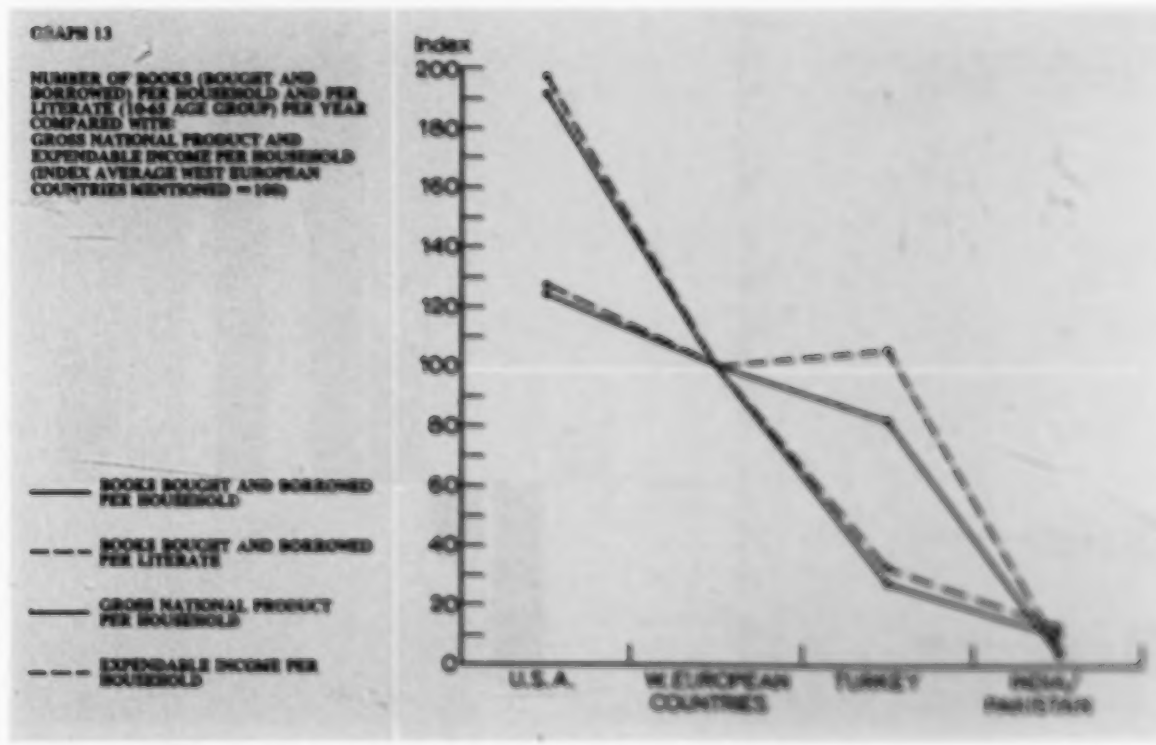
GRAPH 12

NUMBER OF BOOKS (BOUGHT AND BORROWED) PER YEAR PER HOUSEHOLD AND PER LITERATE (10-65 AGE GROUP)



GRAPH 13

NUMBER OF BOOKS (BOUGHT AND BORROWED) PER HOUSEHOLD AND PER LITERATE (10-65 AGE GROUP) PER YEAR COMPARED WITH GROSS NATIONAL PRODUCT AND EXPENDABLE INCOME PER HOUSEHOLD (INDEX AVERAGE WEST EUROPEAN COUNTRIES MENTIONED = 100)



Turkey's strong position here is significant. It is clear that India and Pakistan are only at the initial stage of book usage although we are convinced that their consumption will presently show very strong growth.

Lastly, in graph 13, the data on borrowed and bought books combined have been illustrated per household and per literate together with the G.N.P. and expendable income per household (from graph 2). In order to make the data clear, the average of the five West European countries has been given an index of 100.

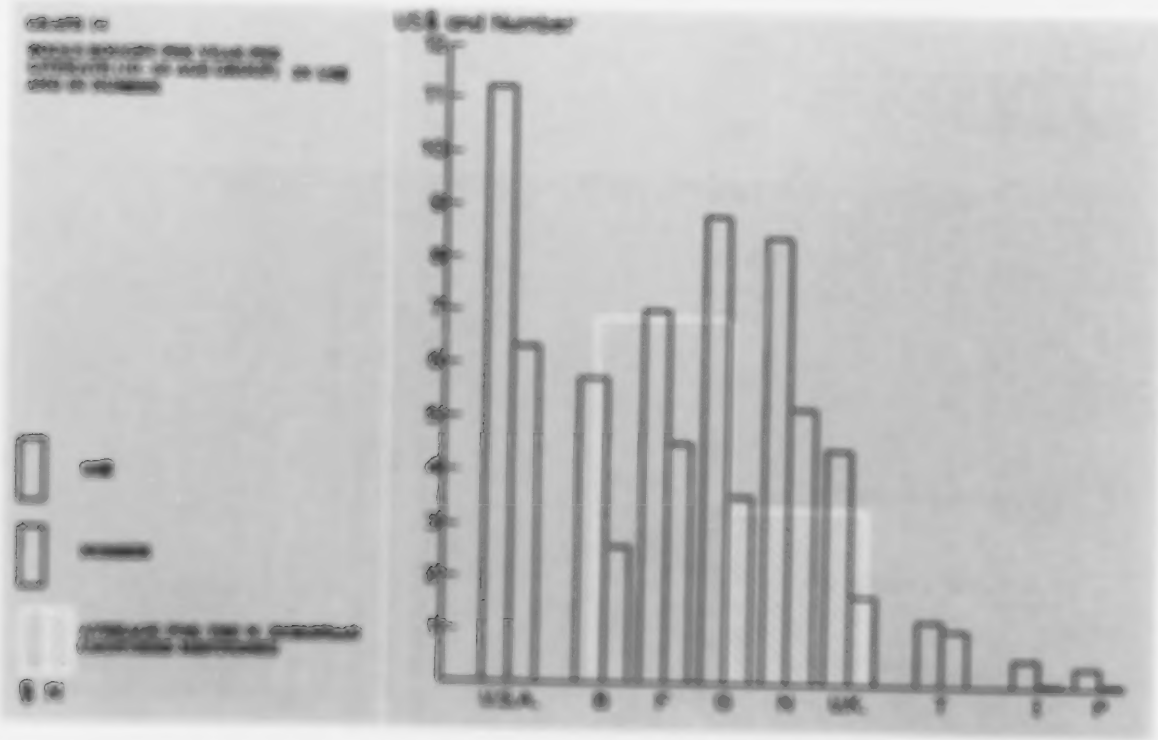
It is obvious that an increase of the expendable income in countries with the lowest degree of economic development will result in an increase in book consumption which will exceed the growth in the expendable income. This phenomenon changes with a further rise in expendable income in that book consumption then goes up much less rapidly.

We do not say that, in the case of an increase in national income per reader, this development will follow the same course in every country; we are however of the opinion that this trend is indicated.

6.2. In terms of money

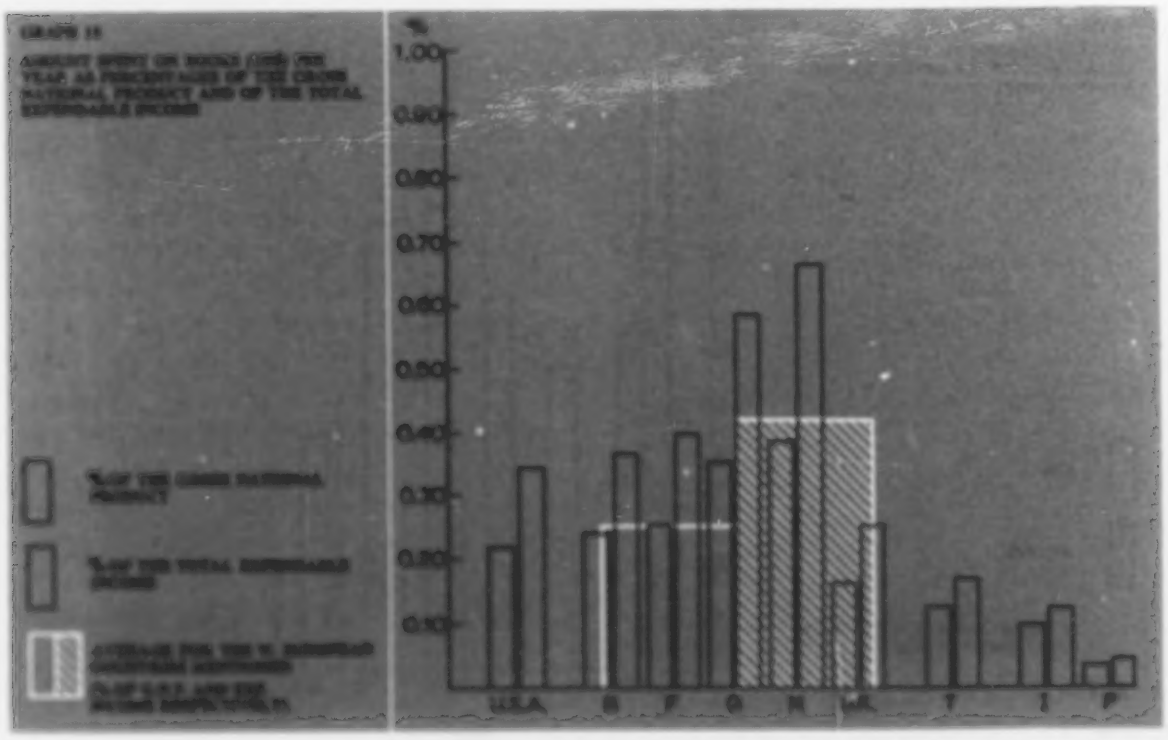
However much publishers may be interested in promoting culture, one may not hold against them the fact that they consider book consumption from the sales angle. In this connection it is of importance to consider what the average annual consumption is, calculated on the basis of literates between 10 and 65 years of age. This is shown in graph 14.

It can be seen from these figures that of the West European countries, West Germany has the highest turnover per reader. Without doubt, here again the consumption in the developing

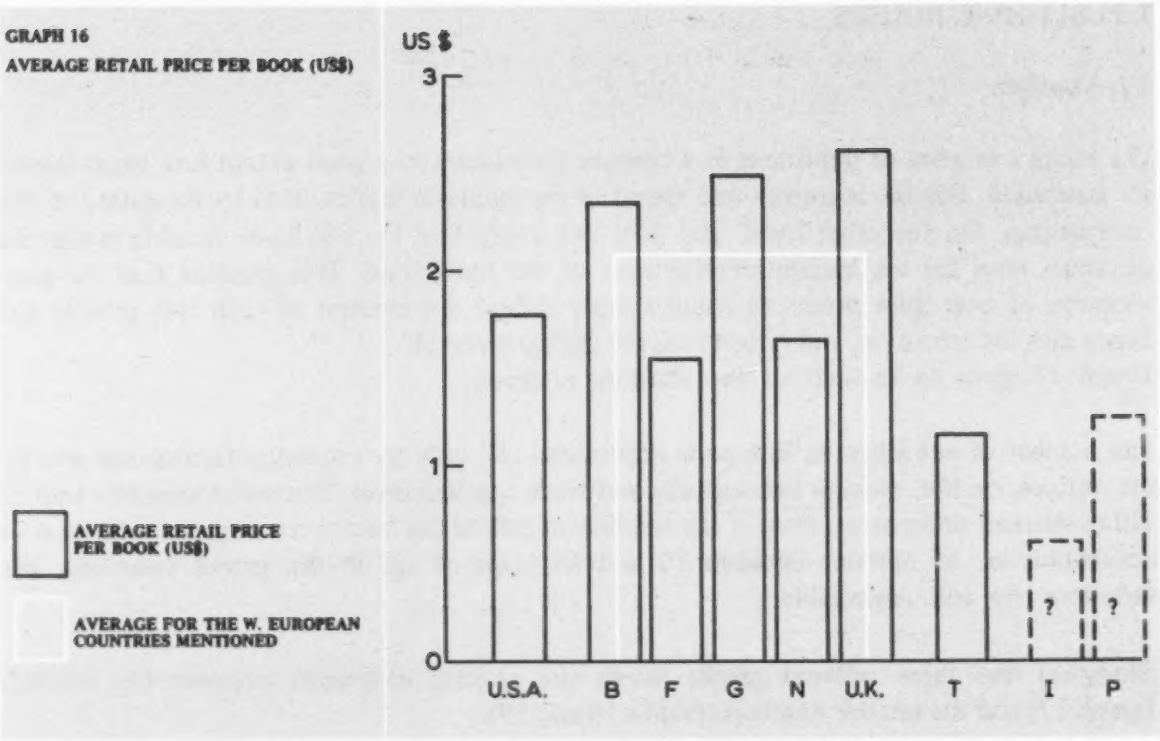


countries measured in goods is higher than the graph suggests. Direct comparison between the U.S.A. and the West European countries is however possible because even though the labour costs in the U.S.A. are high, it is also the country where the greatest proportion of very large printing orders is achieved, with the result that the share of the labour cost in the cost price is reduced.
Lastly it is relevant to examine the percentage of the national income calculated per household that is spent on books. For this purpose it is necessary to consider both the G.N.P. and the expendable income. The relevance of the G.N.P. stems from the fact that books are also to some extent bought by the government, this factor being of especial importance in the developing countries (educational books). Expendable income is also a fitting starting point, as in the developed countries this finances most of the book consumption.

From graph 15 it can be seen that of all the countries surveyed, in The Netherlands the amount spent on books is, in relation to the total quantity of goods and services, relatively the highest.
Without doubt the climate, the population density, the relatively large number of publishing houses (graph 19), the high production of new titles (graph 20) and the active book trade have contributed greatly to this result. It should further be mentioned that the excellent knowledge of foreign languages also plays a role. No less than 45% of the Dutch literate population can read a foreign language, while for Belgium (excluding the bilingual Dutch/French) the figure is 16%, for France 21%, for West Germany 22% and for the U.K. 15%. Almost 11% of the book consumption in The Netherlands relates to books in other languages.
The relatively high book consumption in West Germany is also worthy of mention directly after that of The Netherlands. Without doubt the many, sometimes very large, book clubs in this country have promoted the buying of books. There too, the number of publishing houses is



GRAPH 16
AVERAGE RETAIL PRICE PER BOOK (US$)



relatively high and the competition thus strong (graphs 17 - 19). The great activity of the book-shops also deserves special mention.

The average price of the book alone is not in itself indicative of the value in regard to contents and presentation. But the average price per book must nevertheless be included in the collection of data; graph 16 gives an account of this aspect.

For India and Pakistan we had to make use of estimates. It is possible that a fundamental survey would lead to other results.

It will be noted from graph 16 that the price of books in the U.S.A. is not high. The relatively large share in book production of pocket books and (quality) paperbacks most certainly plays a role in this connection. In West Europe, the low average prices in France and The Netherlands are noticeable. Concerning the latter, it should be remembered that the majority of the books bought are in fact bound so that they are even cheaper than would at first sight appear from the figures. On the other hand there is the consideration that there was (in 1965) practically no purchase tax (1%) on books in The Netherlands whereas in France this is high (ca. 10%).

The different levels of purchase tax on books in the various countries do of course influence the price and hence the sales.

It is therefore not without importance that when harmonizing purchase tax within the E.E.C. countries, the national governments should take good care that books are not taxed more heavily than basic foodstuffs.

For the sake of brevity we have not included this purchase tax corrective, particularly since the elasticity of the demand for books in the various countries is not known.

The differences in book prices can, to a great degree, be traced back to the size of the printing order and hence to the turnover value per title. This is dealt with in graph 21, §7.3.

7. PUBLISHING HOUSES

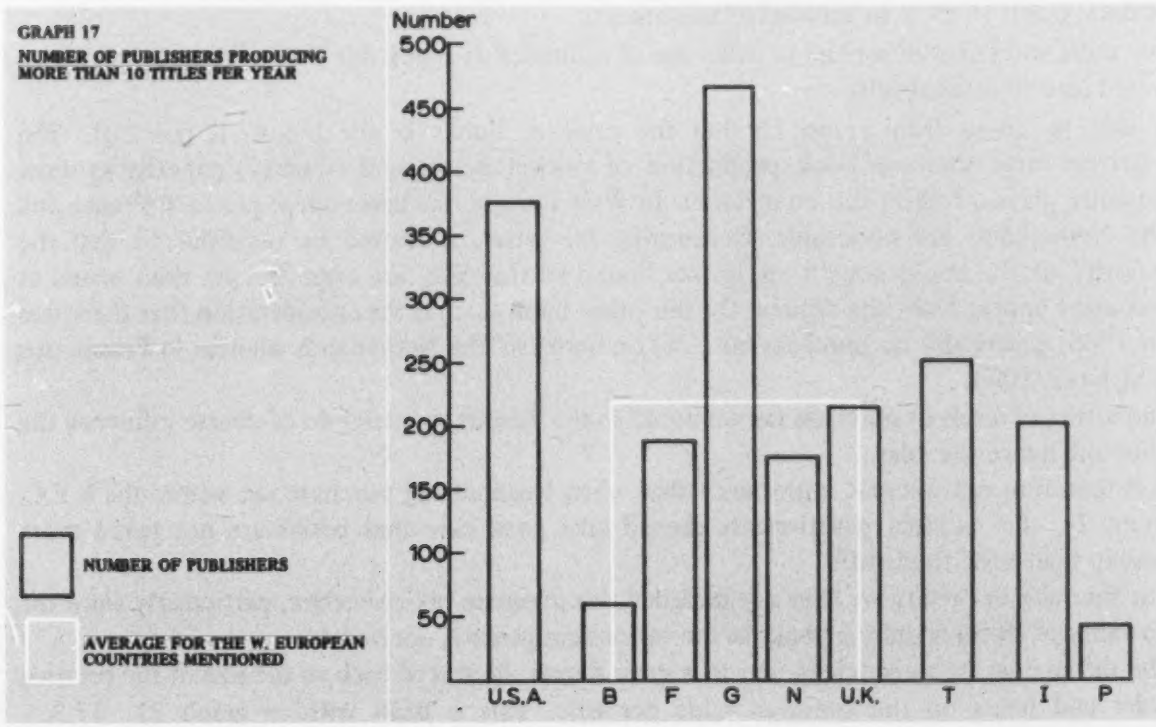
7.1. Numbers

The relative number of publishers in a country determines to a great extent how many books are purchased. For the ingenuity and vigour of the publisher is stimulated by the extent of the competition. On the other hand, this does not imply that the maximum number is also the optimum level for the healthy development of the book trade. It is possible that the great diversity of new titles produced could sharply reduce the amount of each title printed and hence also the return on, and velocity of, the capital invested.
Graph 17 gives an account of the absolute numbers.

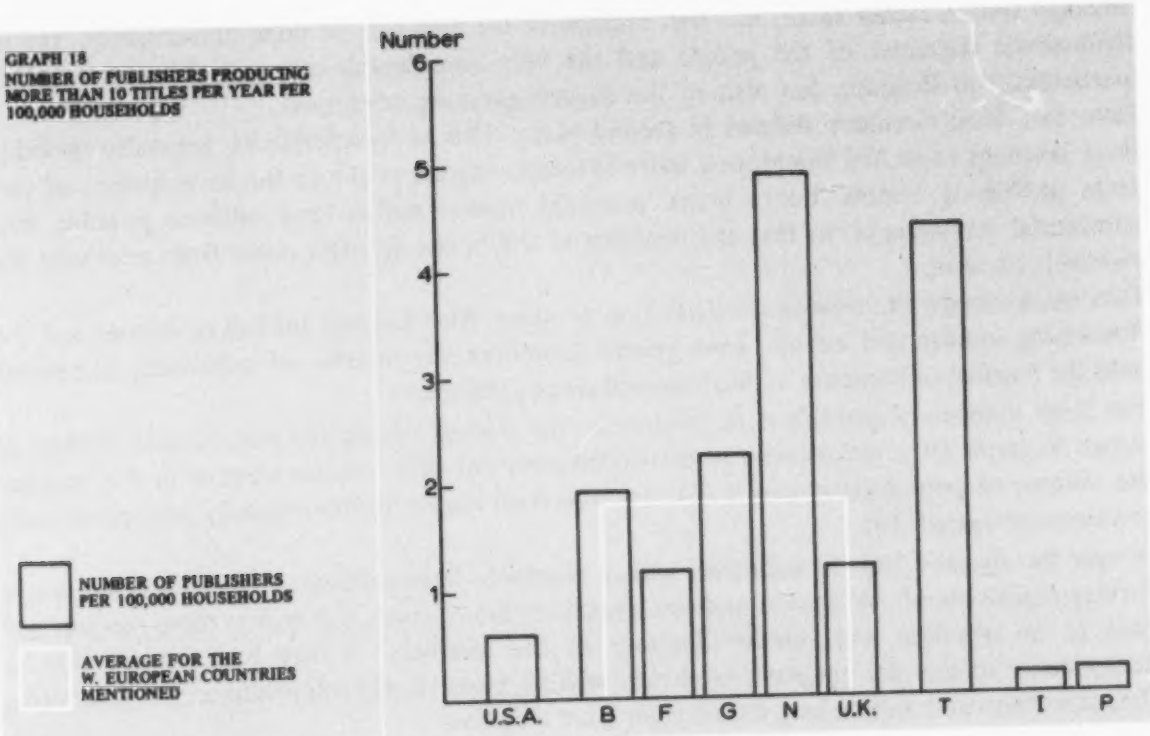
The number of publishers in Europe is determined not only by economic factors, but also by the outlook on life, religion and regional and trade specialization. This can sometimes lead to rather marked differences. Even if the number of publishing houses is compared with that of households or of literates between 10 and 65 years of age in the several countries, the variations are still remarkable.

Study of the three relevant graphs shows the striking difference between the absolute (graph 17) and the relative numbers (graphs 18 and 19).

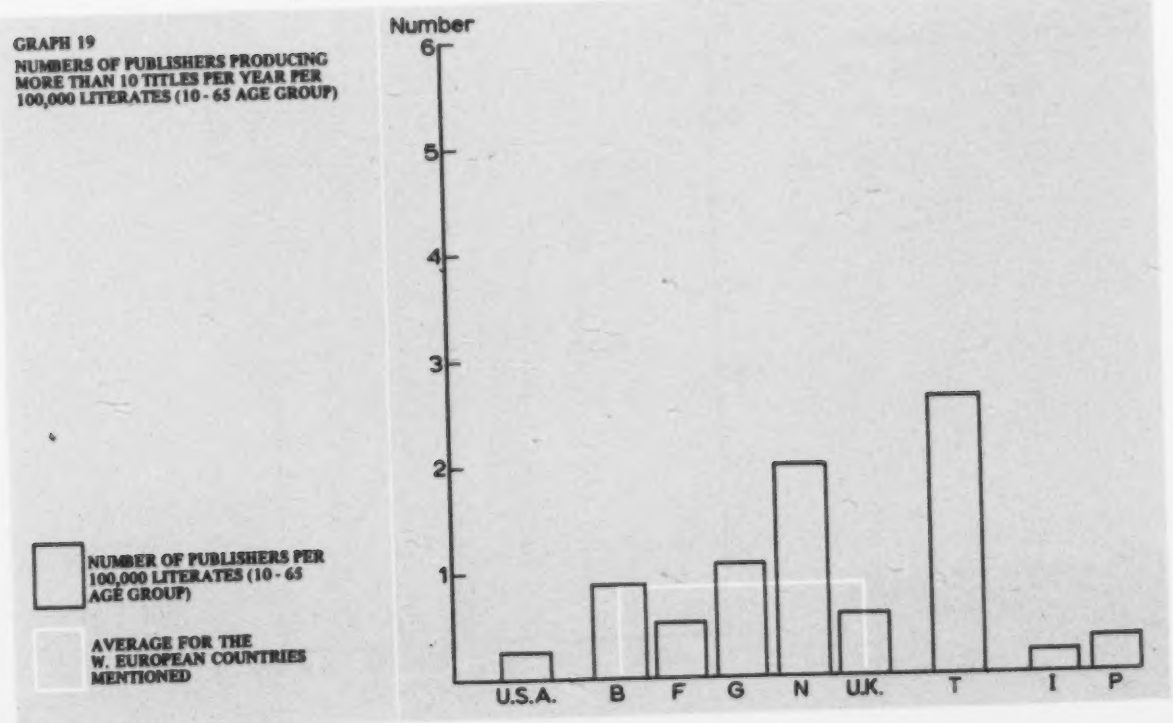
The Netherlands tops the list for countries in which the total population between 10 and 65 years is literate (graph 19). The consumption in this country with respect to households (graph 18) is even higher because of the relatively low number of households in relation to the population (graph 1). The relatively large number of publishers arises not only because the



GRAPH 18
NUMBER OF PUBLISHERS PRODUCING MORE THAN 10 TITLES PER YEAR PER 100,000 HOUSEHOLDS



GRAPH 19
NUMBERS OF PUBLISHERS PRODUCING MORE THAN 10 TITLES PER YEAR PER 100,000 LITERATES (10 - 65 AGE GROUP)



language area is rather small, but also because of the high rate of book consumption, the individualistic character of the people and the very considerable amount of books exported (particularly to Belgium, but also to the English-speaking countries).

Here too, West Germany follows in second place. This is remarkable as, generally speaking, large language areas and therefore a more extensive market promote the development of very large publishing houses. For a broad potential market makes large editions possible with substantial investments, so that the majority of the books on offer come from relatively few publishing houses.

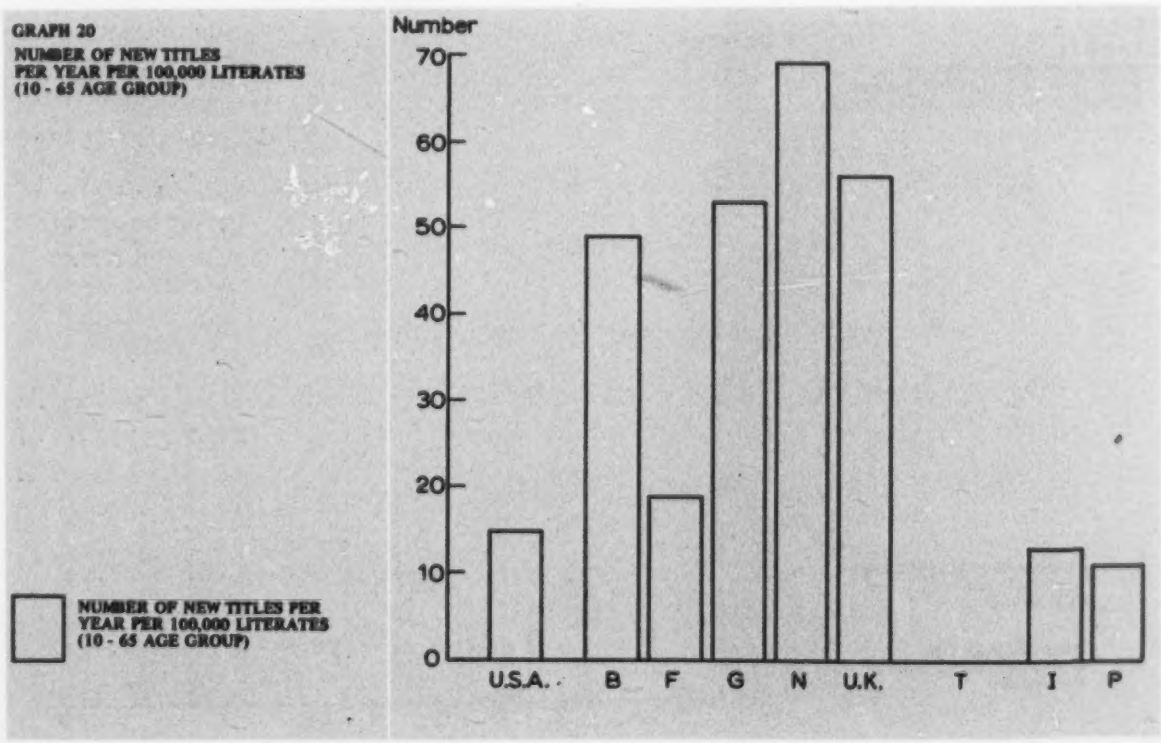
Two main creeds, the relative specialization of many West German publishing houses and the flourishing import and export, have greatly promoted the number of publishing companies (and the number of branches of Austrian and Swiss publishers).

The large number of publishers in relation to the reading population (literates) in Turkey as shown in graph 19 is remarkable. In this connection one may wonder whether in this country the number of publishing houses is not very high with respect to the relatively rather low book consumption (graph 14).

It may be assumed that in countries with a relatively large number of publishing houses, a further expansion of the market and the increase in labour costs will lead to more mergers and thus to an absolute and relative decrease in the numbers. It may be supposed that in consequence of this the optimum level may well be more closely approached, thus promoting the marketing drive and making distribution more effective.

7.2. Title production per year

Since we are concerned with a title production that is bound to a language or language area, we



shall also analyse here the title production per country in relation to the size of the reading population (graph 20).
We shall restrict ourselves to the production of new titles because figures for these are more readily accessible than is the total production of titles including reprints.
It was unfortunately not possible for us to include recent figures for the annual production of Turkey. We mention only that the total number of titles in print is approximately 6,000, which implies 60 titles per 100,000 readers between 10 and 65 years; the corresponding figure for The Netherlands, for example, is 350.
It is impossible within the scope of this work to analyse in detail the cause of variations in the numbers of new titles per year. The following factors may however be mentioned:

1. The number of publishing houses and their relative size (many small publishers produce more new books than do a limited number of large ones);
2. the diversity in outlook upon life and religion of large groups of the population (because of this the same subject is often dealt with in separate books by authors of differing philosophy);
3. the number of languages read by the population;
4. the extent and sales aggressiveness of the distribution network;
5. the relative position of import and export with respect to the national book consumption.

Factors 1, 2 and 5 (export) have led to a relatively high title production in The Netherlands. Factor 5 will also, as far as export is concerned, have influenced the figures concerning West Germany and the United Kingdom. The title production in Belgium is somewhat distorted, as many books published in The Netherlands are simultaneously published in Belgium by the Belgian branch of a Dutch publishing house or in co-production with Belgian publishers.

7.3. Book production

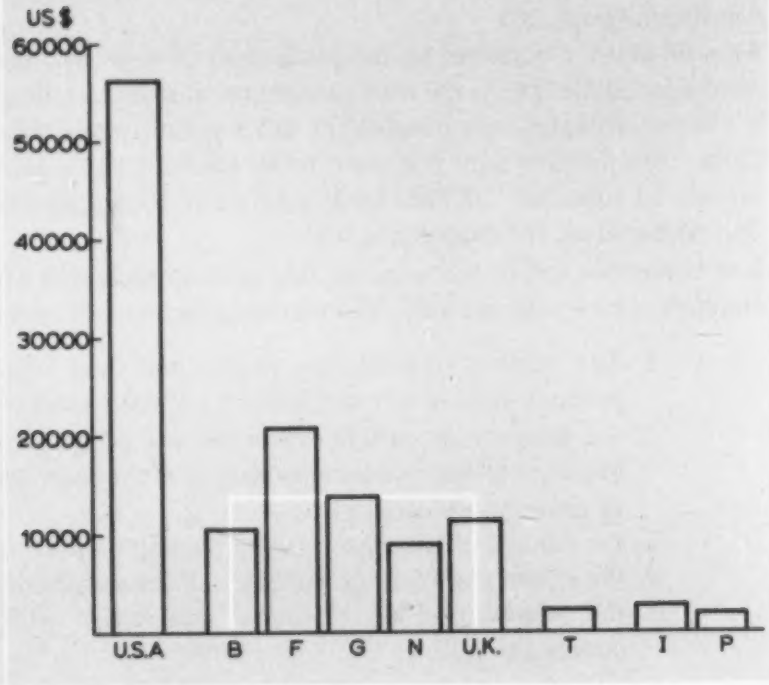
The following figures on book production must to some extent be based on estimates made by national organisations. In many countries publishers still maintain great secrecy concerning the extent of production, so that exact figures are not always available. It was therefore not possible to establish the precise size of the total book production. For, in order to obtain a correct analysis, one should be able to proceed from the equation

production = consumption + export - import

assuming that the relative sizes of the national stocks of books do not on average change. As no exact figures are available in respect of separate export figures based on the foreign sales of the national publishing houses or of import figures based on the quantities taken by them, it is impossible to complete the foregoing equation. This comes about because the real import and export figures result from the summing of the total import and export of the local publishers and the (negative) factors arising from the carrying out of foreign orders by the local printers.
An analysis is given in graph 16 (§ 6.2) of the price per book based on the books bought. The differences in turnover value (in retail prices) per title produced, can, to some extent, be predicted from these average prices. The turnover value is to a large degree inversely proportional to the price of the book (graph 21).

GRAPH 21

AVERAGE TURNOVER VALUE (IN RETAIL PRICES) PER TITLE PRODUCED (US$)

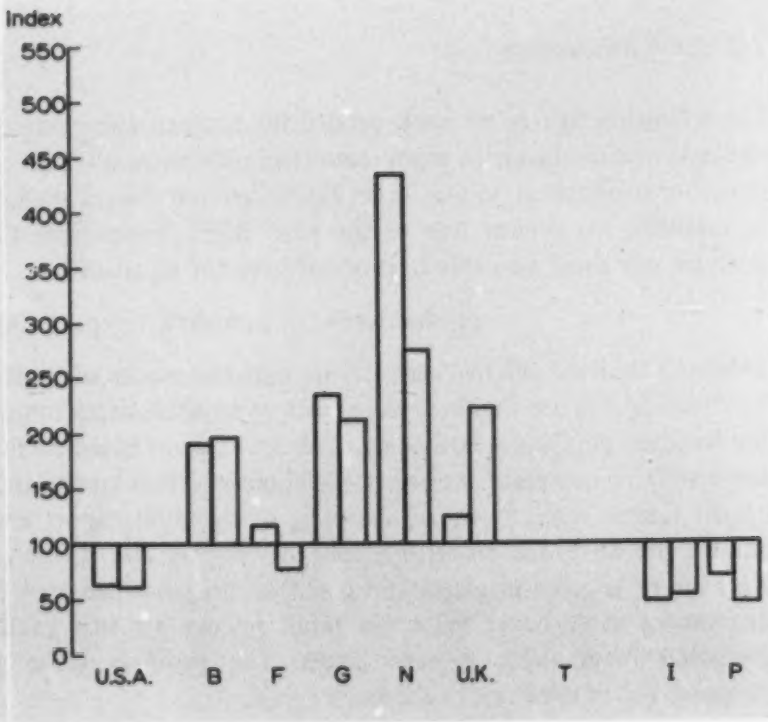


AVERAGE TURNOVER VALUE PER TITLE PRODUCED

AVERAGE FOR THE W. EUROPEAN COUNTRIES MENTIONED

GRAPH 22

RELATION BETWEEN NUMBER OF PUBLISHERS PRODUCING MORE THAN 10 TITLES PER YEAR AND NUMBER OF NEW TITLES PER YEAR (PER 100,000 LITERATES, 10 - 65 AGE GROUP); (AVERAGES FOR ALL COUNTRIES (EXCLUDING TURKEY) =100)



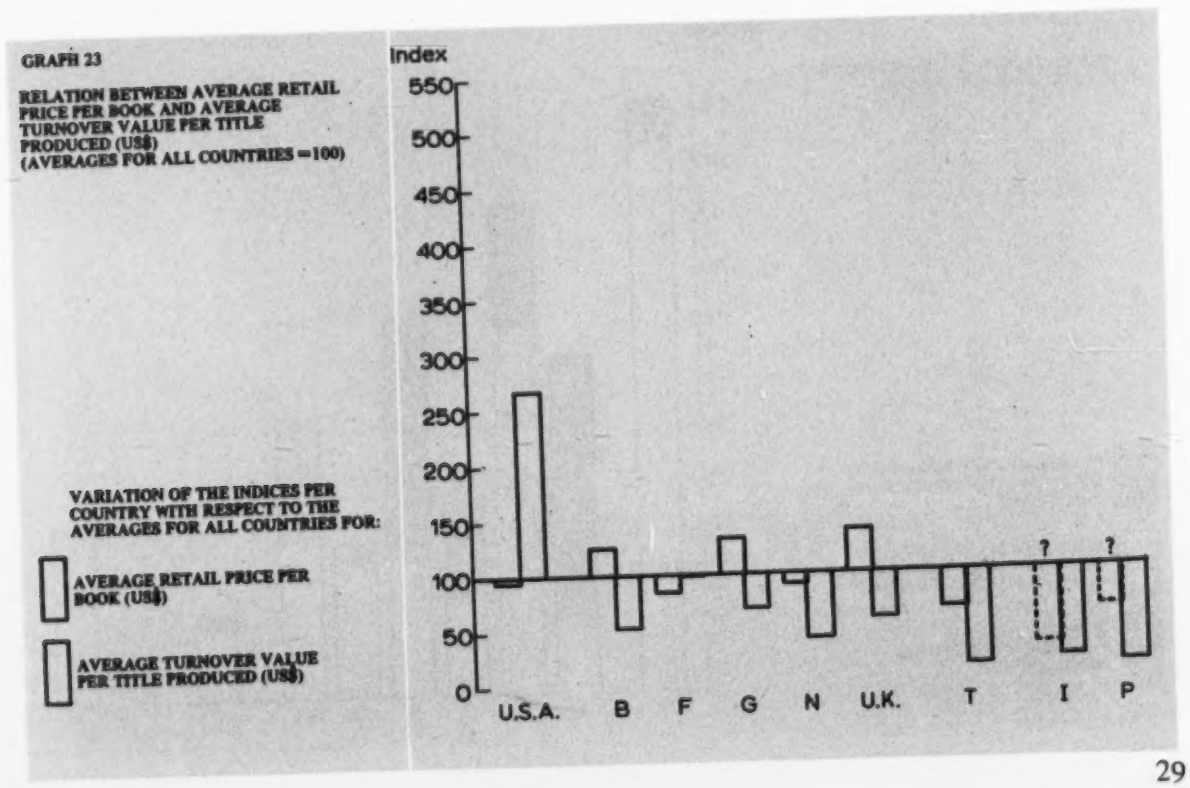
VARIATION OF THE INDICES PER COUNTRY WITH RESPECT TO THE AVERAGES FOR ALL COUNTRIES (EXCLUDING TURKEY) FOR:

NUMBER OF PUBLISHERS PRODUCING MORE THAN 10 TITLES PER YEAR PER 100,000 LITERATES (10 - 65 AGE GROUP)

NUMBER OF NEW TITLES PER YEAR PER 100,000 LITERATES (10 - 65 AGE GROUP)

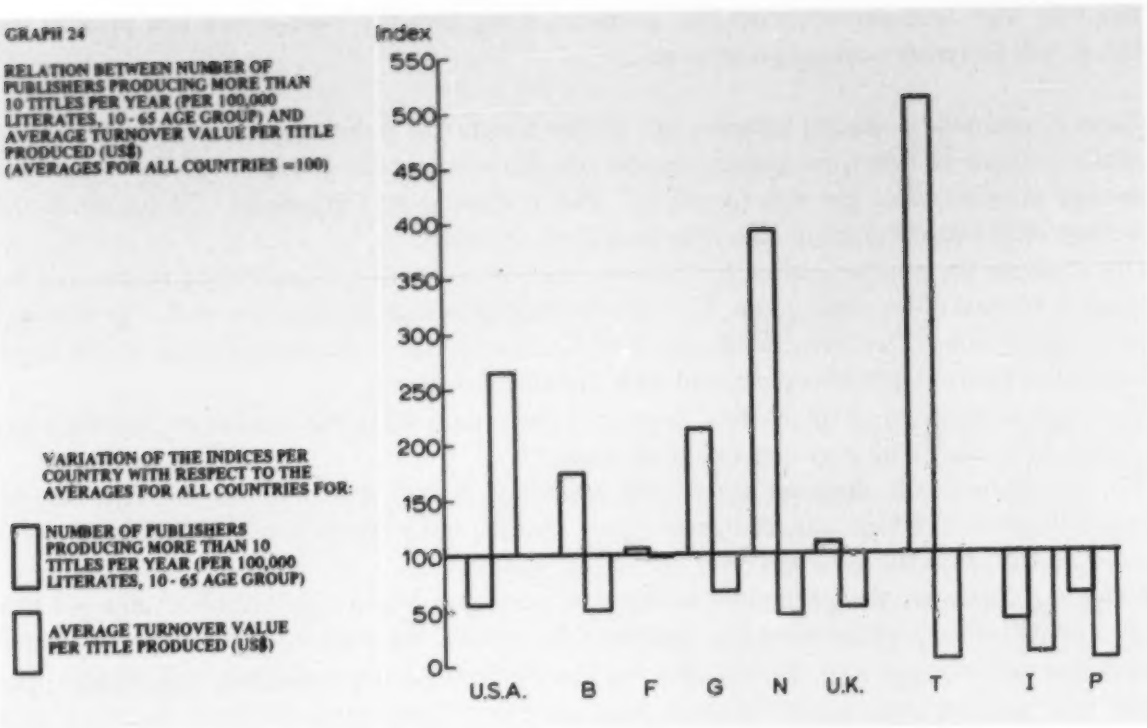
The very high turnover value per title produced along with the average very low price in the U.S.A. will therefore come as no surprise.

There is naturally a relation between the relative number of publishing houses (graph 19), the relative number of new titles annually (graph 20), the average price per book (graph 16) and the average turnover value per title (graph 21). This is illustrated in graphs 22 - 24 (in which the average value (number) has in each case been given the index 100).
One may see the positive connection between the relative number of publishing houses and the number of new titles from graph 22. Title production is high in countries with a great many publishing houses (The Netherlands and West Germany), but is not proportional to the larger number of publishing houses compared with the other countries.
The singular significance of the West German figures in regard to the number of publishers has already been dealt with in connection with graph 19.
The variations in the diagrams concerning publishing houses and titles for the U.K. may be traced back to the high export figures; these include many educational books intended for countries of which the U.K. was once the mother country.
Graph 23 illustrates the phenomenon that low book prices and high turnover value per title are usually inversely proportional or, expressed differently, that high book prices are connected with low turnover per title. Remarkable for The Netherlands is the relatively low average price per title coupled with a low turnover value per title. Competition between the many publishers in this country is thus very great.
We have already commented on the figures with regard to book prices in India and Pakistan (see graph 16).



GRAPH 24

RELATION BETWEEN NUMBER OF PUBLISHERS PRODUCING MORE THAN 10 TITLES PER YEAR (PER 100,000 LITERATES, 10 - 65 AGE GROUP) AND AVERAGE TURNOVER VALUE PER TITLE PRODUCED (US$)
(AVERAGES FOR ALL COUNTRIES =100)

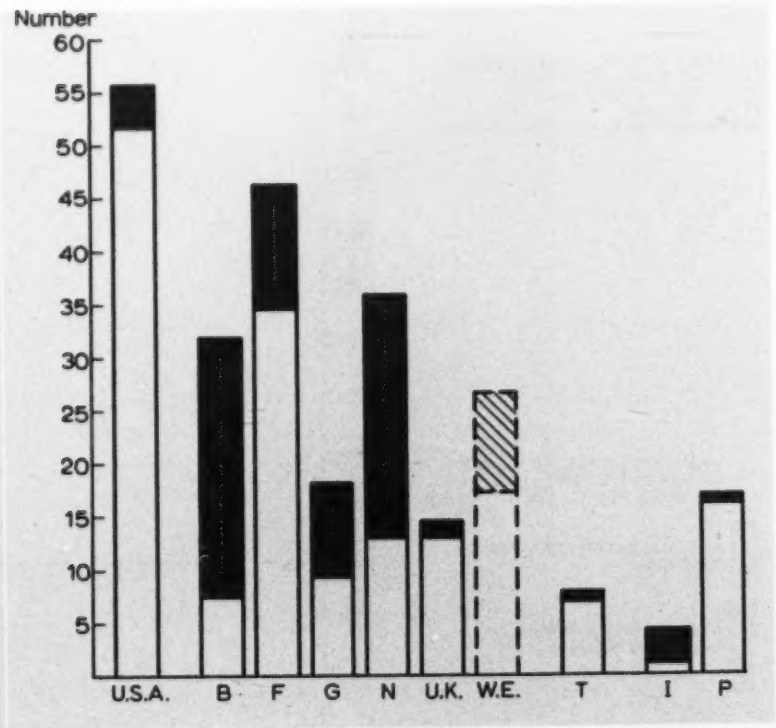


VARIATION OF THE INDICES PER COUNTRY WITH RESPECT TO THE AVERAGES FOR ALL COUNTRIES FOR:

- NUMBER OF PUBLISHERS PRODUCING MORE THAN 10 TITLES PER YEAR (PER 100,000 LITERATES, 10 - 65 AGE GROUP)
- AVERAGE TURNOVER VALUE PER TITLE PRODUCED (US$)

GRAPH 25

NUMBER OF SALES OUTLETS PER 100,000 LITERATES (10 - 65 AGE GROUP)



- NUMBER OF REAL BOOKSHOPS PER 100,000 LITERATES (10 - 65 AGE GROUP)
- NUMBER OF SECONDARY SALES POINTS PER 100,000 LITERATES (10 - 65 AGE GROUP)
- AVERAGE FOR THE W. EUROPEAN COUNTRIES MENTIONED

Graph 24 shows that the number of publishing houses and the turnover level per title are generally inversely proportional.

We can take it that for the development of reading and buying habits it is desirable that the number of publishing houses and book titles should not be too low. This may be seen from a comparison between graphs 22 and 15 (books bought as % of the expendable income, etc.).
On the other hand too high a number of publishing houses and book titles can form an obstacle for the vigorous growth of the market. The average publishing house does not then have the necessary capital and profit potential in order to be able to give the book a powerful position. Especially if the supply of other goods in the secondary or tertiary necessities sector is in the hands of a few very large (inter)national concerns, the relative reduction of the market for books is a real danger. The protection which a (small) language area provides against the penetration of large publishing houses from other countries may be of importance to the local publishers. It can be a disadvantage to the development of the national book market as a whole.

8. DISTRIBUTION

The supply of books we have described leads to consumption via many and varied distribution channels. The most important of these are:

a. those in which the buyer is (predominantly) active,
   1. the real bookshop or section of a department store which is practically exclusively devoted to the sale of books
   2. the secondary sales point, where the sale of books takes place in the same space as that of other daily provisions, luxuries, clothing, etc. and of other "impulse" commodities.

b. those in which the buyer is (predominantly) passive,
   1. colportage (door-to-door sales)
   2. direct mail
   3. book club without opportunities for choice

c. those in which the buyer is both passive and active, such as the book club in which a choice can be made.

For each kind of distribution channel there is sometimes notable variation both concerning the type (and variety) of books sold and concerning the socio-economic characteristics of the buyers. It is known that men with a relatively high level of education and income generally buy in the bookshop stocking a large selection of books. The women's share in the turnover of the secondary sales points (where the selection is very limited) is – certainly in Europe – much higher than that of men. Books bought in bookshops are, on average, of a higher price than those bought on impulse at secondary sales points.

It is interesting to examine the relative numbers of bookshops and secondary sales points per 100,000 literates.
It is clear from graph 25 that the relation between the numbers of bookshops and secondary sales points is, from the point of view of the bookshops, most favourable in India and West

Europe (with the exception of the U.K.), and least favourable in the U.S.A. and Pakistan. We have the impression that the figures for Belgium and the U.K. are not entirely comparable. The combination of the news-stand with the sale of a limited number of books is perhaps interpreted differently in these countries with respect to the real bookshop as such.
It should be borne in mind that the relative numbers say nothing regarding the division of turnover between these kinds of outlets. In West Europe the turnover of the bookshops will be very much higher than that of all the secondary sales points combined.

In the U.S.A. there will be an interaction between the relatively low position of books in the total expenditure (graph 15), the relatively low number of publishing houses (graph 19), the high turnover value per title (graph 21) and the comparatively small number of bookshops. The other sales channels in the U.S.A. (door-to-door sales, direct mail and book clubs) are however highly developed and very actively carry out a good part of the task which is traditionally taken care of by the bookshops in, for example, Europe.

It is desirable that the publishing houses should promote the best possible development of the book trade. In "old" book countries such as those of West Europe the publishers' provision of availability- and information-services has made an essential contribution to the enlargement of the market resulting from well-informed readers.
On the other hand new, large groups of readers will be brought in touch with books by means of confrontation with the book at home (door-to-door sales, direct mail, book clubs) or during daily shopping (secondary sales points). The increasing importance of the use of books as a bonus with the purchase of other goods should also be mentioned.
Through large chains of bookshops or by means of voluntary chains, the book trade in the various countries will no doubt be able to retain its share of the market within the framework of the present distribution revolution.

9. CONCLUSION

The purpose of the material we have discussed is to familiarize you with the great variations in reading, borrowing and buying habits concerning books, their background and connection with the world of the publishing house. The static figures concern nine countries which on the basis of the present degree of development may more or less be considered to be extensions of one another. These figures could, per country, be dynamically enlarged with similar figures showing development per topic during, for instance, the last 10 years. From these, conclusions could be drawn in regard to the extent of increase of the national figures in an international framework.
Unfortunately, however, it proved impossible to obtain figures for all the countries concerned, and we have therefore had to limit ourselves to about the year 1965. We do nevertheless hope that the figures will have given you an insight into the general trends that characterize the book market and the factors which determine its size and growth potential.

The macro-economic goal which is appropriate to this information is the conception that reading habits etc. concerning books are capable of expansion via external and internal factors. This applies not only to the (highly) developed countries, but especially to the developing ones. The graphs clearly show that these latter still have a long way to go in order to reach the level

of the developed countries. In this regard the development aid given by the highly industrialized nations will be of the utmost importance.

This does not necessarily imply that, as discussed in Stockholm in the summer of 1967, copyrights on intellectual achievements from the developed countries do not need to be fully paid for. They should be financed from the development aid provided by the industrialized nations. In this way it is also possible to give a country's own authors a suitable reward without the resulting in book prices higher than those arising from the use of foreign copyrights.

Considering the limited space at our disposal we do not deem it necessary to repeat here all the conclusions drawn from the various sections.
We shall limit ourselves to the following:

1. that the relative share of the purchase of books within the national income and expendible portion of the income per household decreases as follows in the nine countries surveyed: The Netherlands, West-Germany, France, Belgium, U.S.A., U.K., Turkey, India, Pakistan (§ 6.2, graph 10);
2. that a countries with an approximately equivalent degree of economic development the differences in book consumption can still vary greatly way (§ 6.1, graph 11);
3. it can be assumed that a relatively high borrowing rate as opposed to the buying of books (1:8,1) or a low borrowing rate (1:men) can damage development and expansion of the book market (§ 6.1, graph 9);
4. *the reading population increases annually in the developed countries* (excluding migration) by 1% and even by 3 or more % in the underdeveloped ones (§ 5.2);
5. the socio-economic factors which influence book consumption (employment, urbanization, prosperity, education, leisure) can, as the degree of development advances, cause the sale of books to increase at a much greater rate than does the number of readers (§ 5.4. - 5.8., graphs 5 - 8);
6. Book consumption rises more than proportionately to the growth of the G.N.P. although it is also possible that with a very high degree of development the increase of this consumption remains behind that of a further increase of the G.N.P. (§ 6.1., graph 12);
7. the optimum utilization of the expansion potential of the book market arising from external factors should, in some countries, lead to a decrease in the number of publishing houses. Because of this one book will be in a better position to turn the expansion potential of the book market into a real increase (§ 7.1.);
8. modern marketing methods and the hold the (groups) of concerns applying secondary and tertiary recreation have on the distribution sector, demand an equally functional approach from the publishing house based on an exact knowledge of the book market and the factors which may influence it (§ 1 - 5).

We have attempted, without the use of jargon, to give a number of figure concerning the book market. Undoubtedly the data will give rise to many questions among the readers - possibly many too of questions. We hope that this has created a great deal of awareness in your mind concerning the position of your publishing house within the framework of the developing whole. This will in turn lead to consideration of what use the data can be put to on the micro-

economic scale for each company or group of companies. We hope to be able to answer this in some degree during the congress.
There will also be an opportunity to give a summary of the conclusions of, as far as we know, the first extensive survey of reading motives, which was made in The Netherlands in 1967.

Drs. R.E.M. van den Brink

Amsterdam,

January 1968.

The processing of the data received from the organizations together with those from other sources has been done by the Netherlands Centre for Marketing Analyses N.V. in Amsterdam. The graphs were prepared by the marketing office of Elsevier Publishing Company in Amsterdam. Although the figures have been drawn from the most recent data they do not for every country always refer to the same year (they are mainly for 1967, although some are for 1966 and 1968; the census figures are mostly for 1960). The institutes which have provided general statistical material differ greatly per country in the extent of their facilities. Not all the data are compiled anew every year. However this need not detract from the usefulness of these figures as we restrict ourselves to recording general international differences in the size and structure of markets.

Some of the information contained in this paper is based upon estimates; these come from sources that are regarded as reliable. We write will however be grateful to receive any comments on the various figures quoted. These comments should reach him at Spuistraat 110-112, Amsterdam C., well before the Congress since otherwise consideration of the points raised will be impossible.

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